STAEDEAN – Life Sciences Solution

Installation Guide for a Microsoft Dynamics 365 for Finance and Supply Chain Environment

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1. INTRODUCTION

1.1 Purpose

Microsoft's current best practices and requirements about the implementation and management of Microsoft Dynamics 365 for Finance and Supply Chain Management (D365) environments demand a wide set of activities.

Lifecycle Services (LCS) for Microsoft Dynamics is a collaboration portal that provides an environment and a set of regularly updated services that can help manage the application lifecycle of your D365 implementations.

The deployment of new D365 cloud environments is done using LCS, and it requires specific activities described in this document.

1.2 Scope

This document describes the activities required to deploy a new D365 cloud environment.

The setups and configurations needed for PowerApps, Power Automate, PowerBI and Workflows are not in the scope of this document.

1.3 Referenced Documents

1. TEMPLATE
    a. Infrastructure Overview (IOV).
2. LINKS
    a. Microsoft Dynamics Lifecycle Services (LCS) link: https://lcs.dynamics.com/v2
    b. Azure DevOps link: https://azure.microsoft.com/en-us/services/devops/?nav=min
    c. Microsoft Azure link: https://portal.azure.com
    d. Refer to Attachment A.

1.4 Responsibilities

The responsibilities are defined below.

1.5 Acronyms

D365	Microsoft Dynamics 365 for Finance and Supply Chain Management
LCS	Microsoft Dynamics Lifecycle Services
LSS	Life Sciences Solution
DB	Database

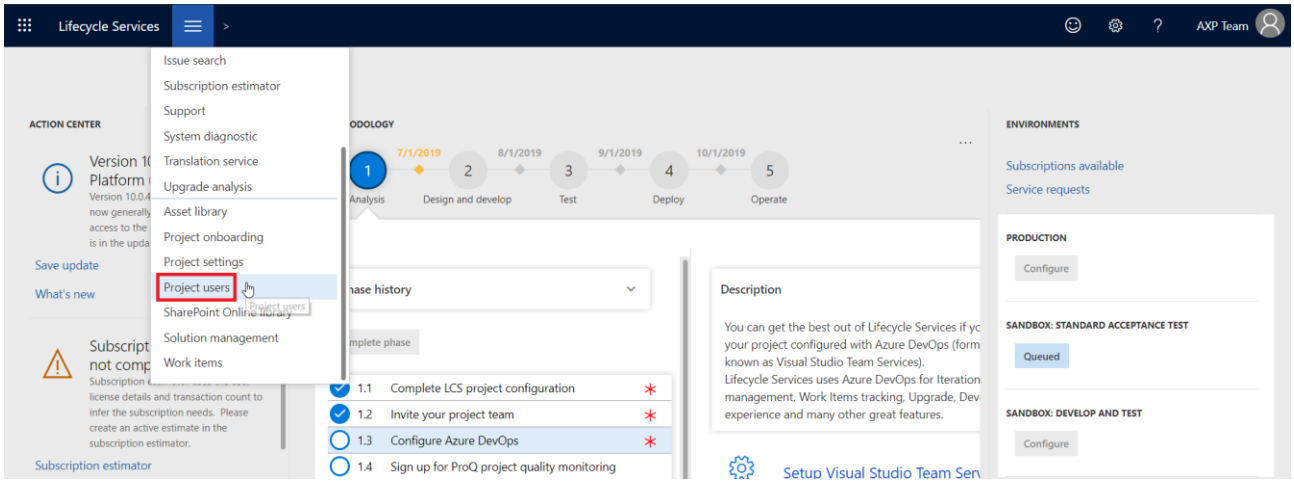
2. Test and Development Environments

To prepare the "Test" and "Development" environments of Microsoft Dynamics 365 for Finance and Supply Chain Management (D365), the Solution Architect has to:

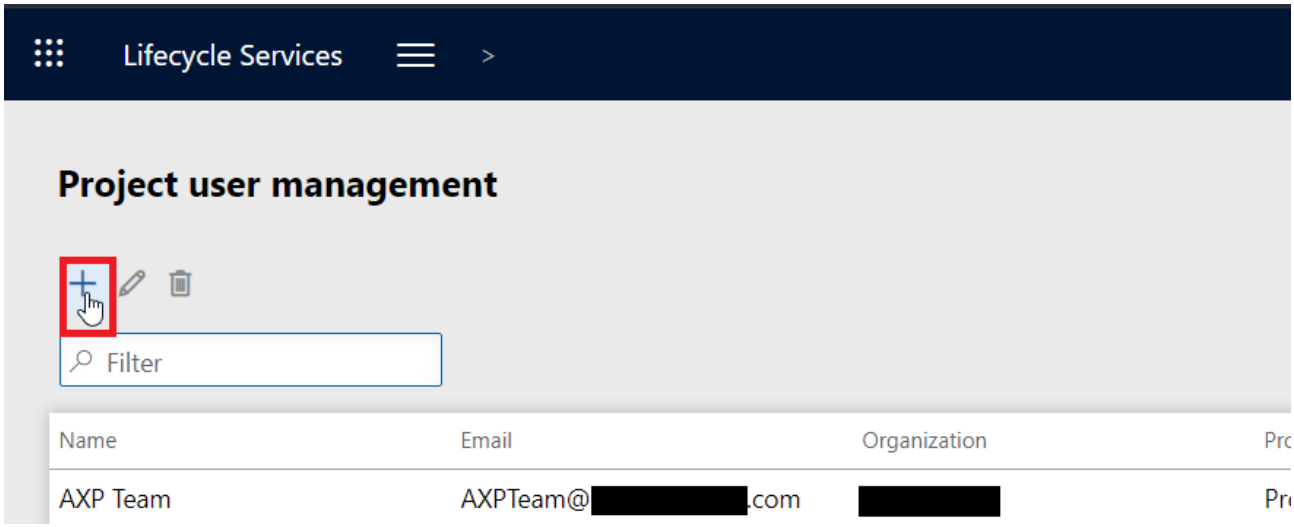
1. Connect to LCS (link: https://lcs.dynamics.com/v2) and select the project.
2. Setup the user.

   Please note: it is mandatory to log on with a user's credentials that belong to the Customer's domain. This user must be a project owner – if not, add it as Project Owner following the steps below:

   a. Select Project users:



   b. Select "+";



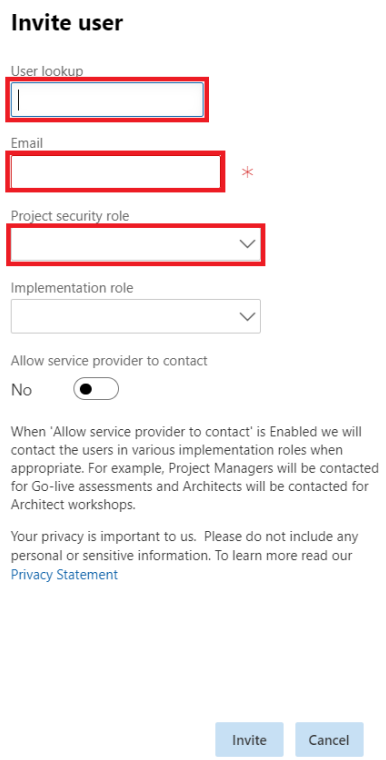
   c. Fill in the following fields as indicated below:

      i. **User lookup**: name and email of the new user (who belongs to the Customer's domain);

      ii. **Project security role**: Project Owner;

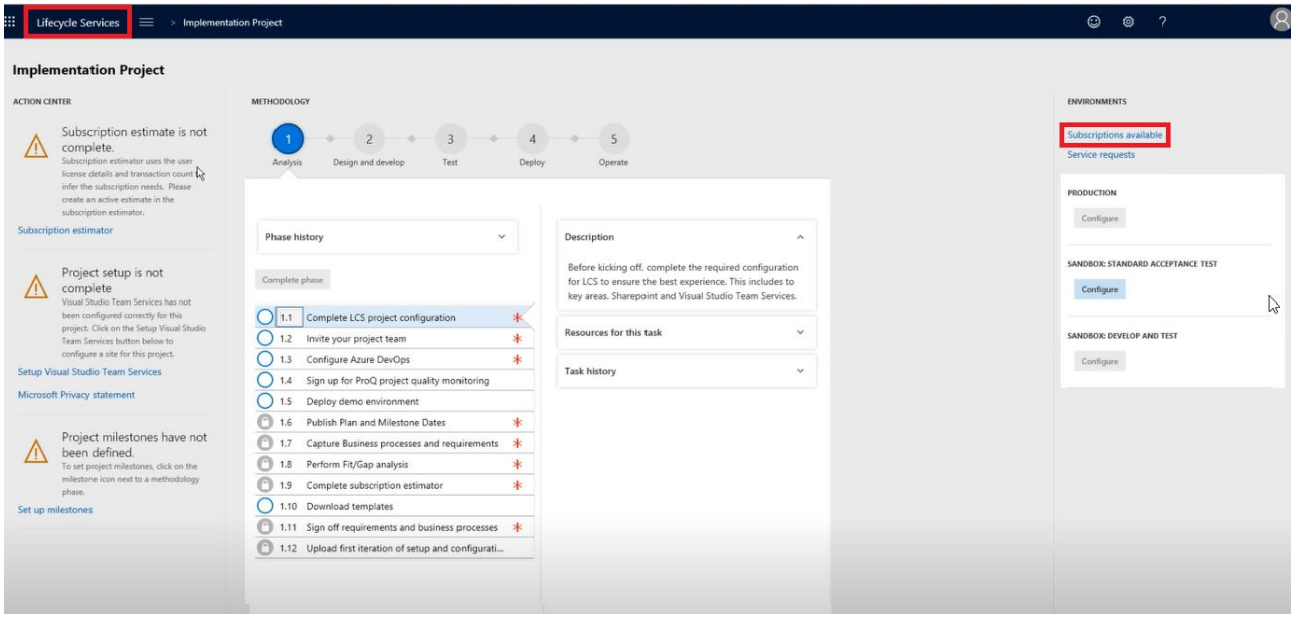
      iii. **Implementation role**: Architect.

   d. Then click "Invite".



3. Verify subscription following the steps below:

   a. Click "Subscription available";

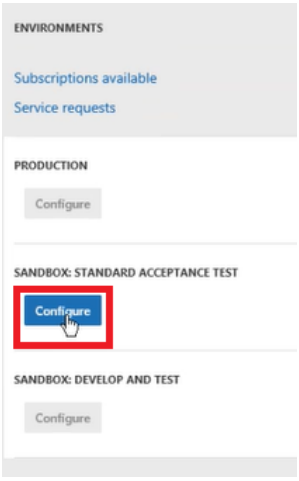


   b. Verify that at least one line of the license is available.

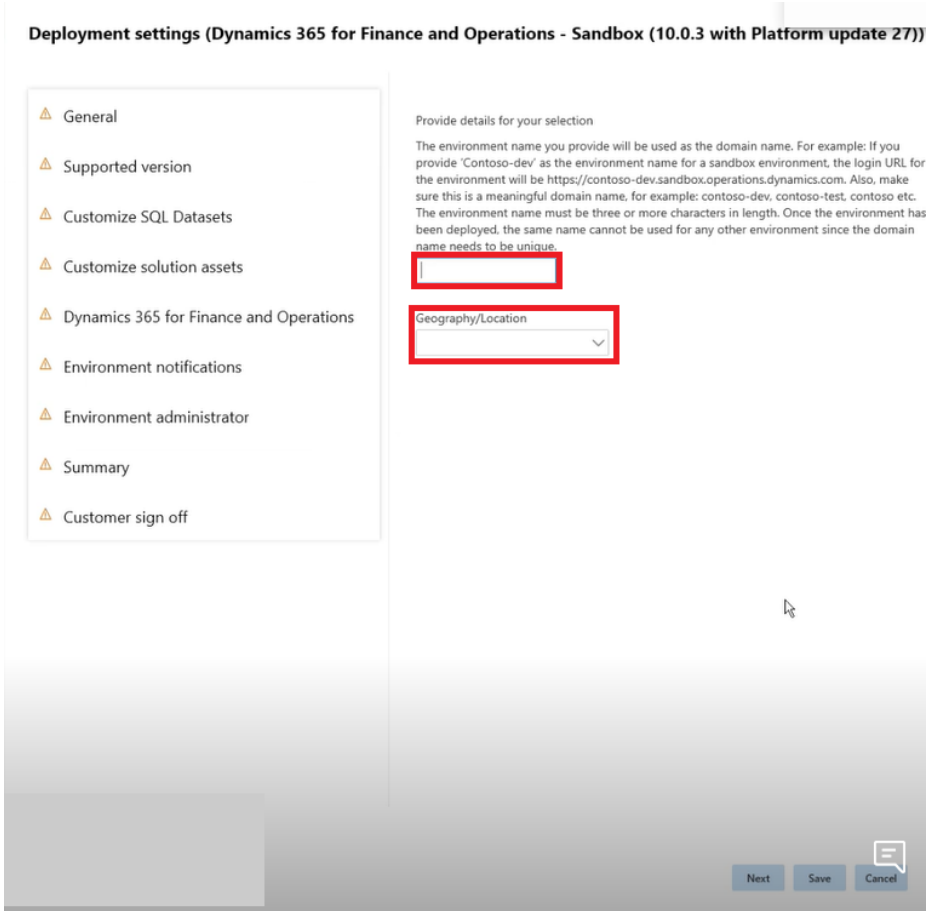
2.1 Preparation of a Test environment

To create the Test environment, the Solution architect has to perform the steps below:

1. Click "Configure" on the Standard Acceptance Test (SAT) environment.

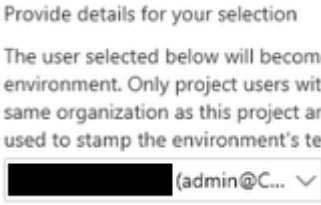


2. Select the last version. If the version needed is not available in the dropdown menu, click "Change selected topology."
3. Fill in the following fields as indicated below:
   a. Environment name: [Customer code]-sat;
   b. **Geography/Location**: select the location closest to the Customer headquarter ([1]).
4. Click "Next" (at the bottom of the page).

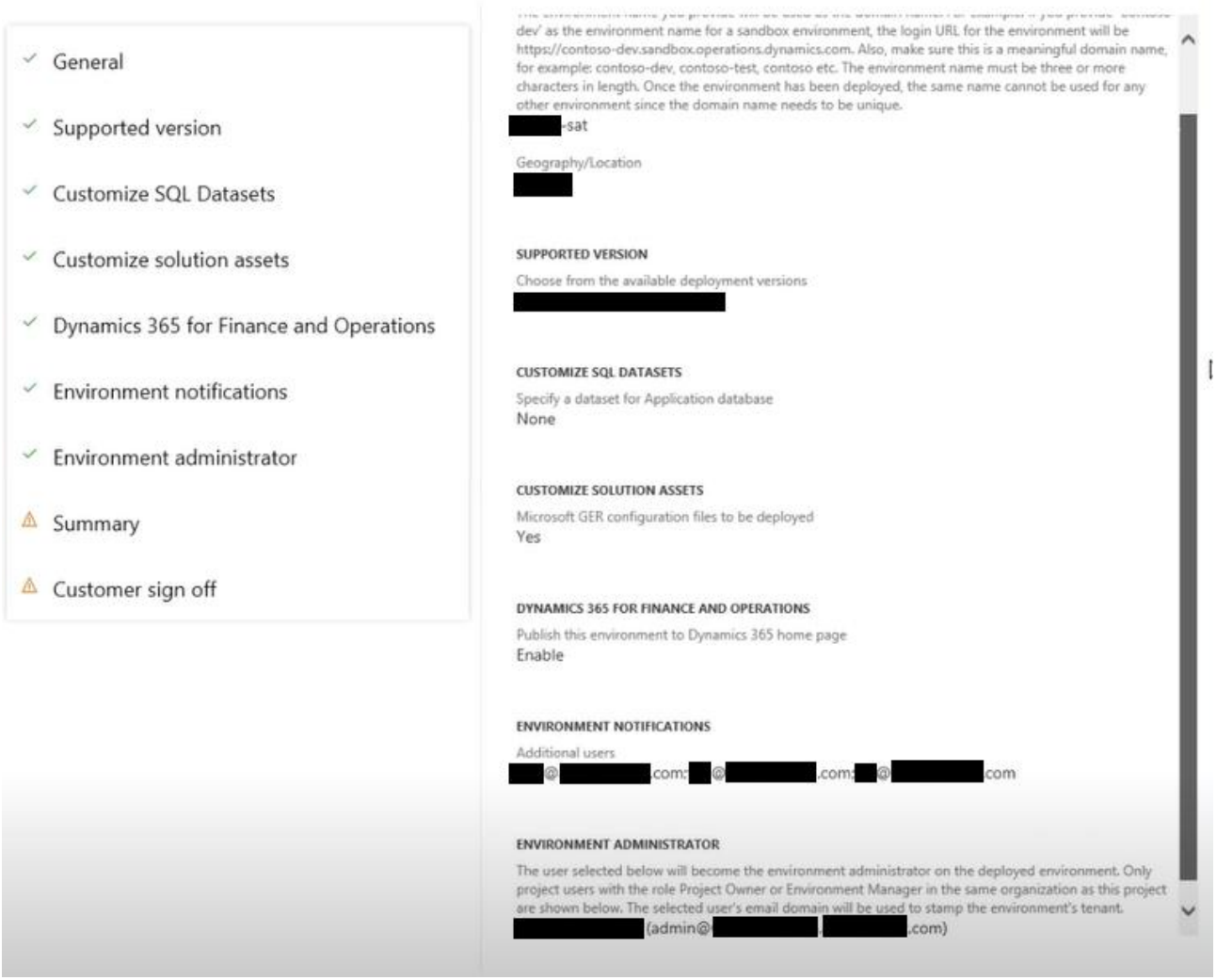


5. For each subsequent screen, leave the fields filled in by default and click "Next".
6. Select the Customer's user as in the screenshot below.

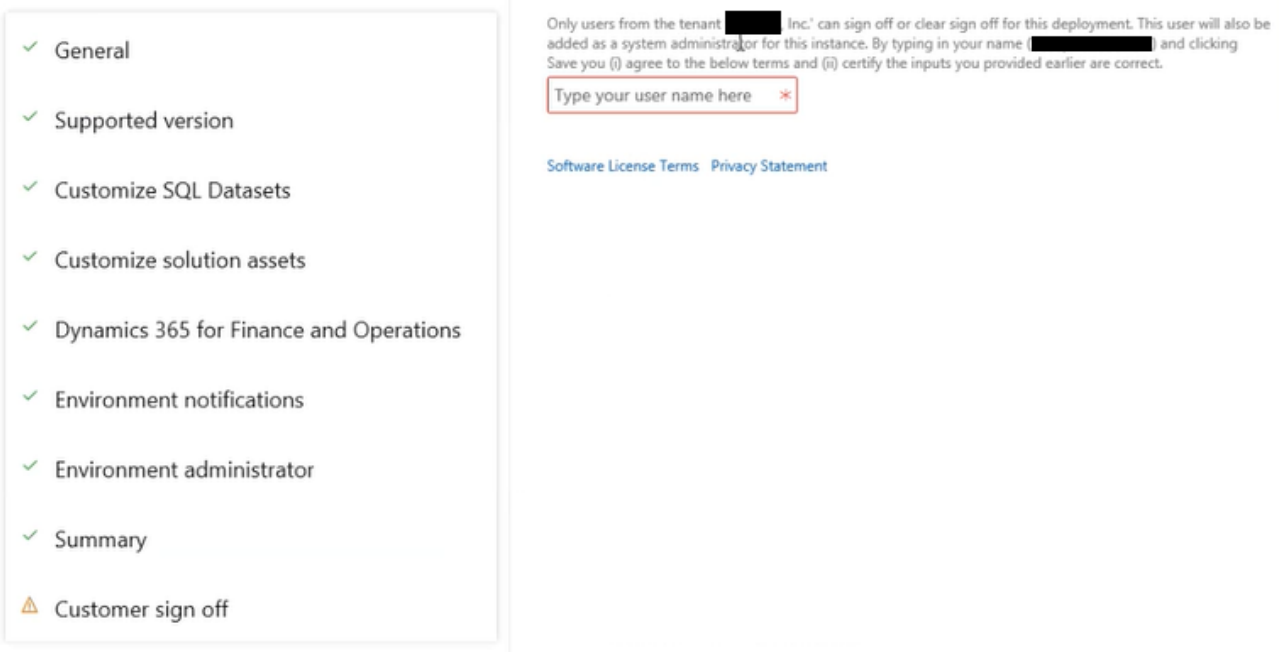
[1] The choice of the geography can require an analysis of the latencies from the offices. For more information, use can use this tool to verify latencies and this page for reference.



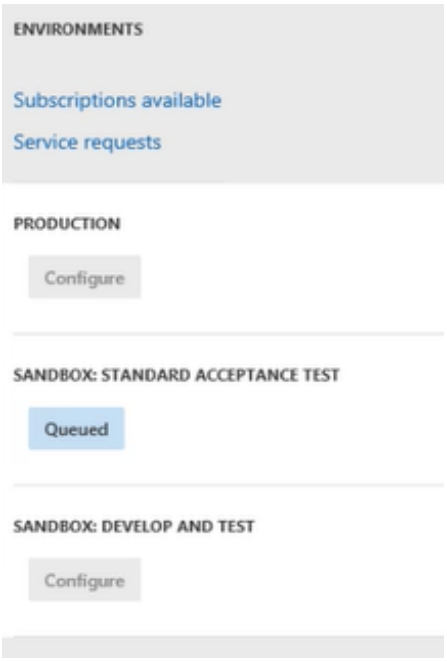
7. Then, a summary of the compiled forms is then shown as below:



8. Insert the name indicated below in the **Type your user name here** field.
9. Click "Save". Then, click "Yes" to confirm the procedure.



10. Then, a recap window is shown with the status of the environment that has been changed to "Queued":



Microsoft requires some hours to prepare the environment and make it available.

2.2 Preparation of a Development environment

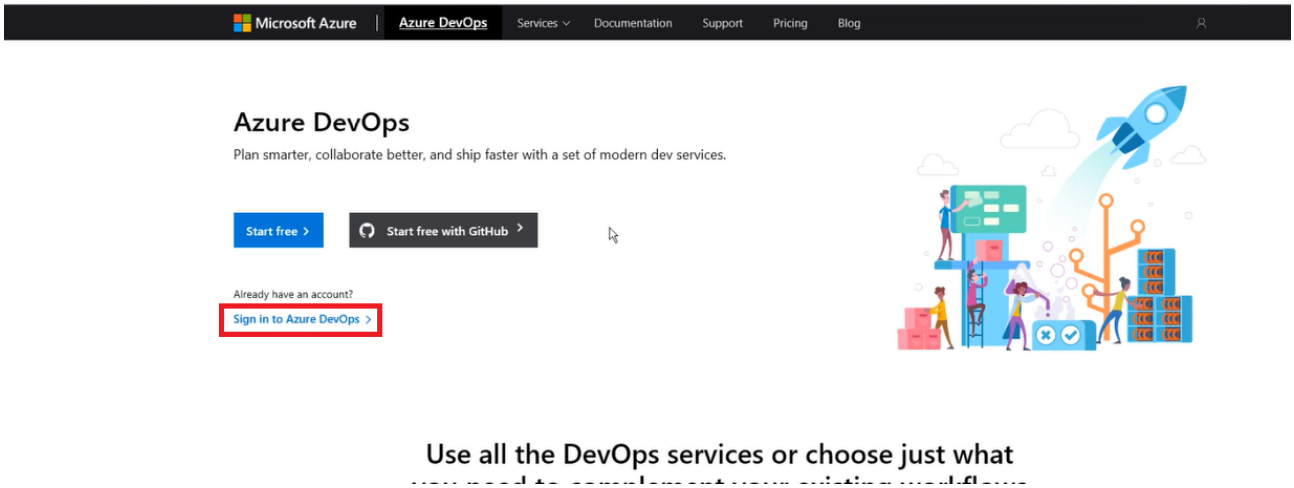
To create the Development environment, the Solution Architect has to set up Azure DevOps and connect an Azure connector to LCS in advance.

2.2.1 Setup DevOps

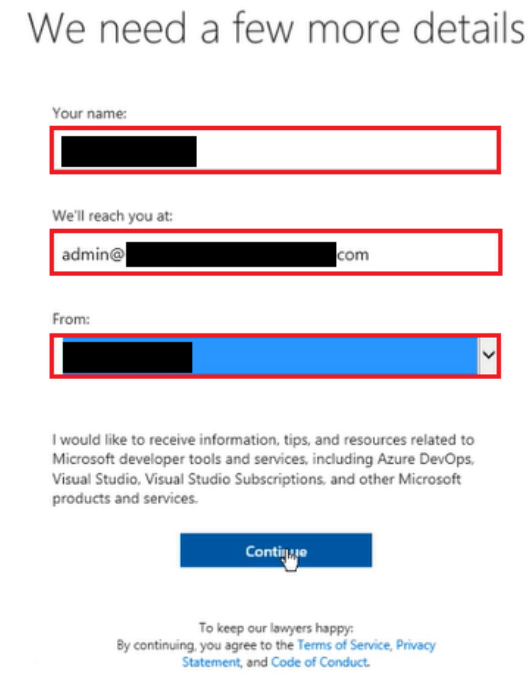
2.2.1.1 Create a new Organization

To set up the DevOps, the Solution Architect has to:

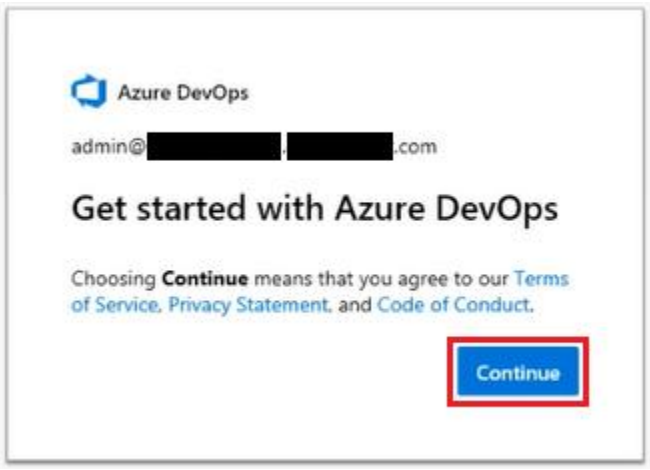
1. Open Azure DevOps (link: https://azure.microsoft.com/en-us/services/devops/?nav=min), already signed as the Customer's user.
2. Click "Sign in to Azure DevOps".



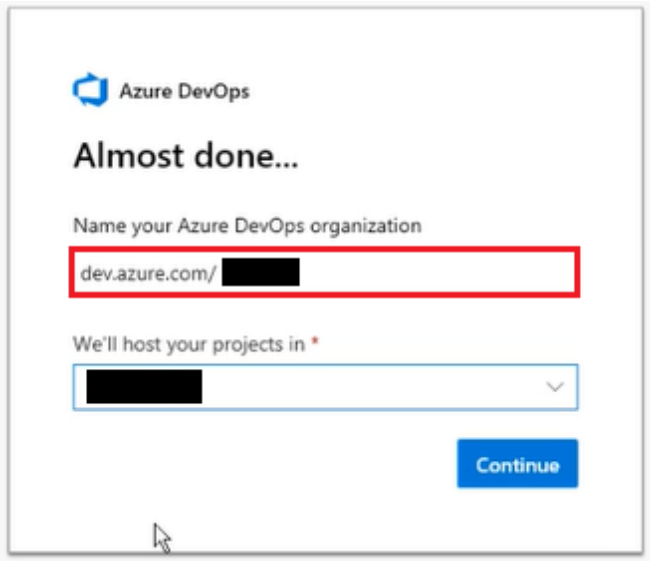
3. Fill in the following fields:
   a. **User name.**
   b. **User email.**
   c. **From**: select the location closest to the Customer headquarter.



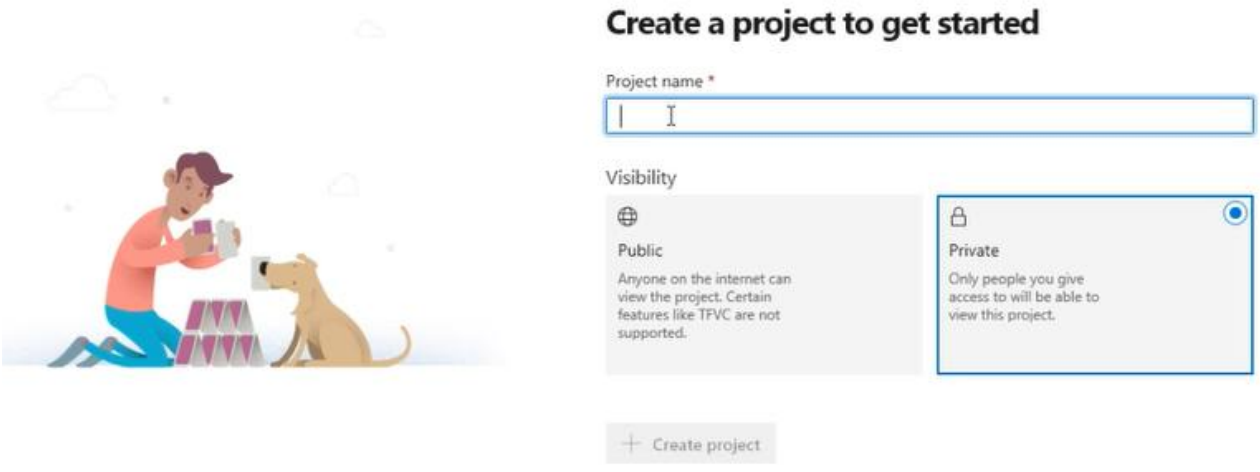
4. In the following forms, click "Continue" to proceed to the "Create a project to get start" form.



5. Copy the link available in the "Name your Azure DevOps organization" field. This is the DevOps URL.

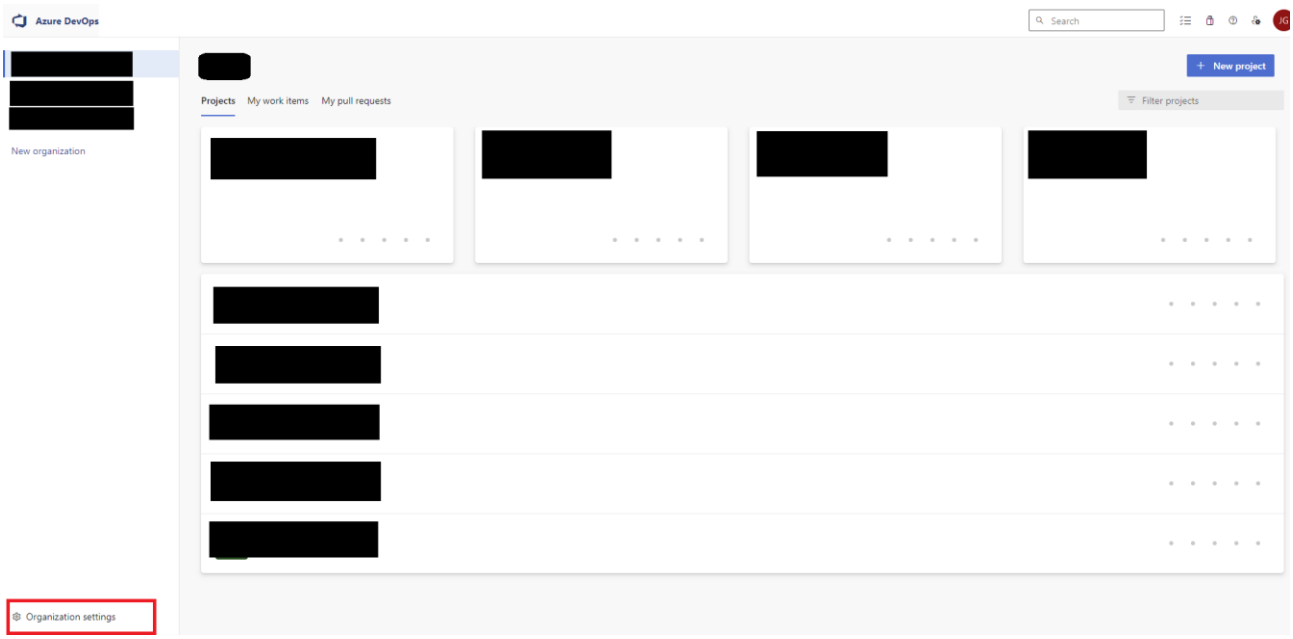


6. When it is displayed, close the "Create a project get started" form.

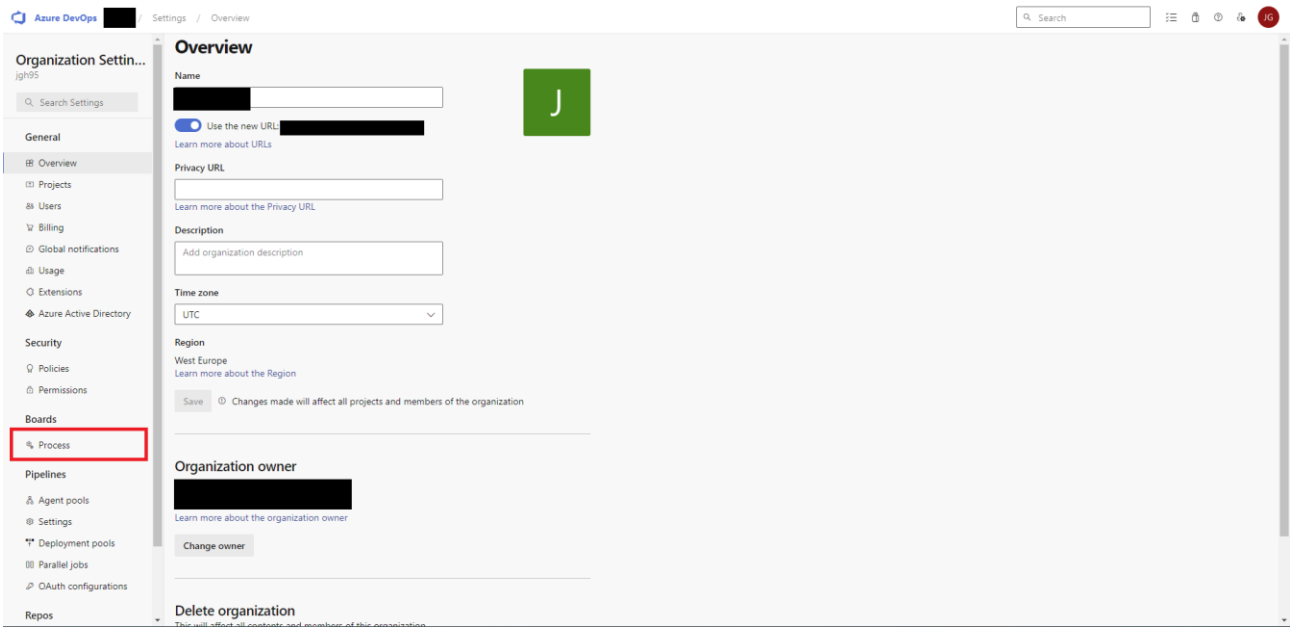


2.2.1.2 Create “SDN” process

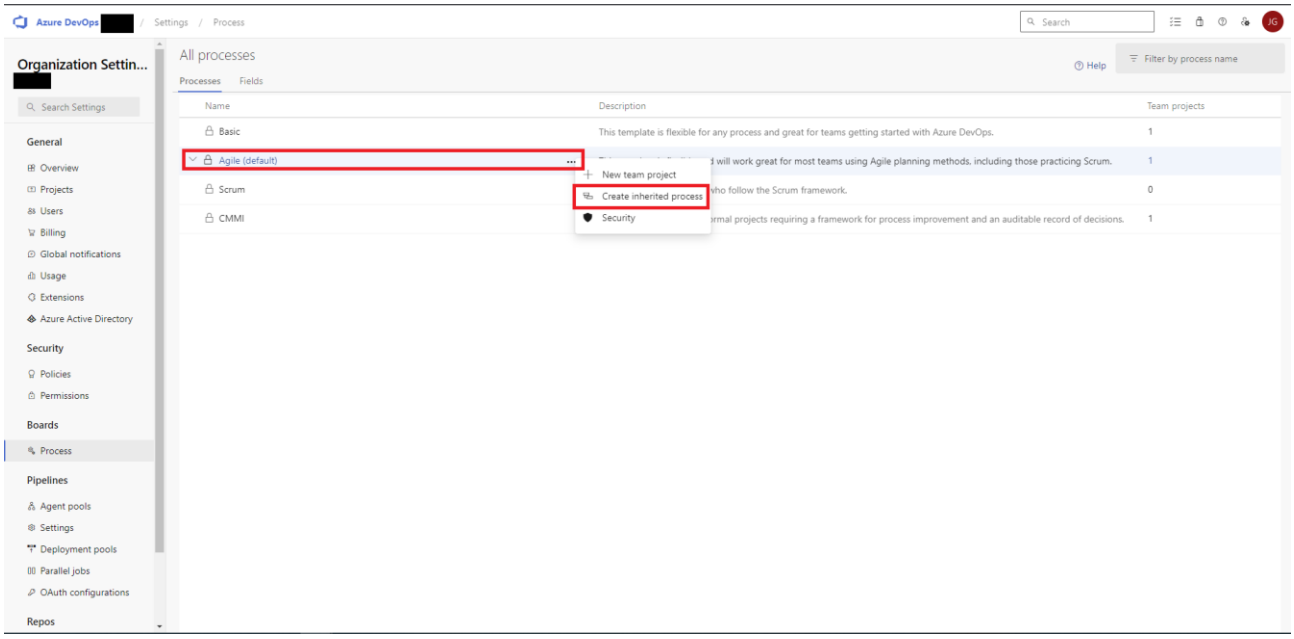
1. Open Azure DevOps (link: https://azure.microsoft.com/en-us/services/devops/?nav=min), already signed as the Customer's user.
2. Click on **Organization settings**:



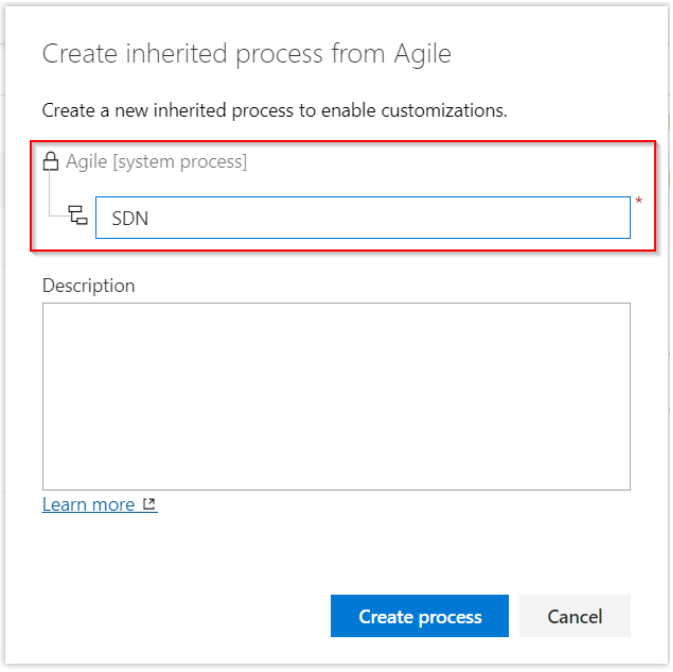
3. Under **Boards**, click on **Process**:



4. Select the “Agile process” and click on “**...**” then click on **Create inherited process from Agile**:



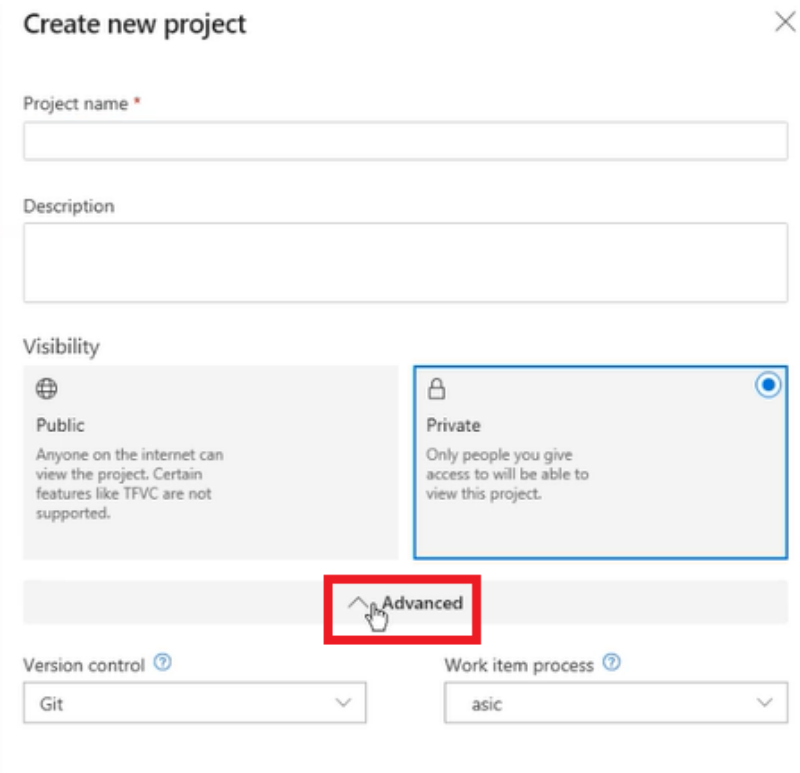
5. Insert “SDN” and click **Create process**:



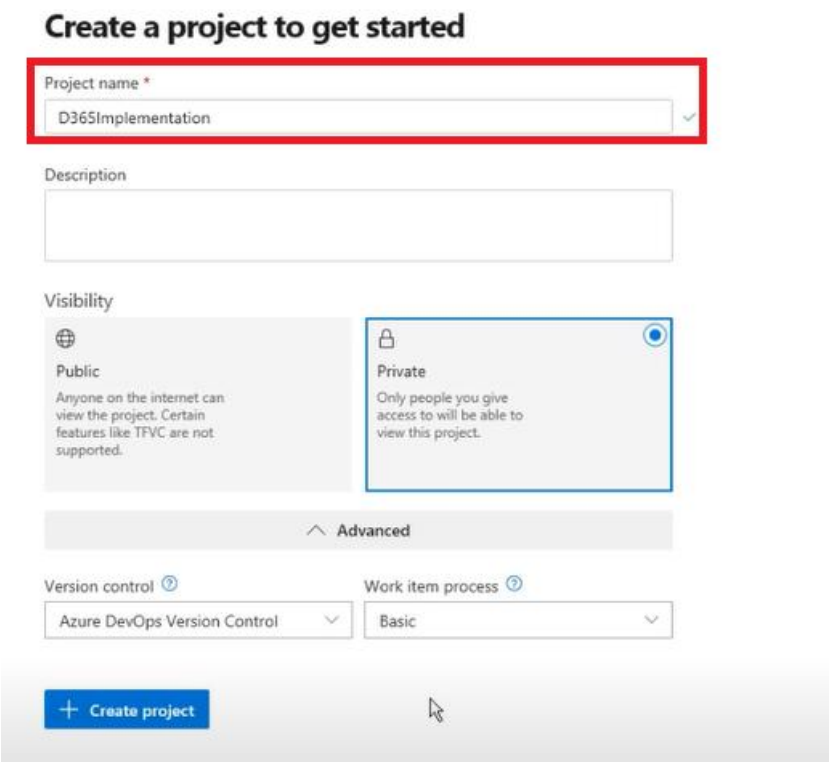
Note: SDN will further provide instructions to configure the process structure or will configure the process structure depending on customer’s policies.

2.2.1.3 Create a new Project

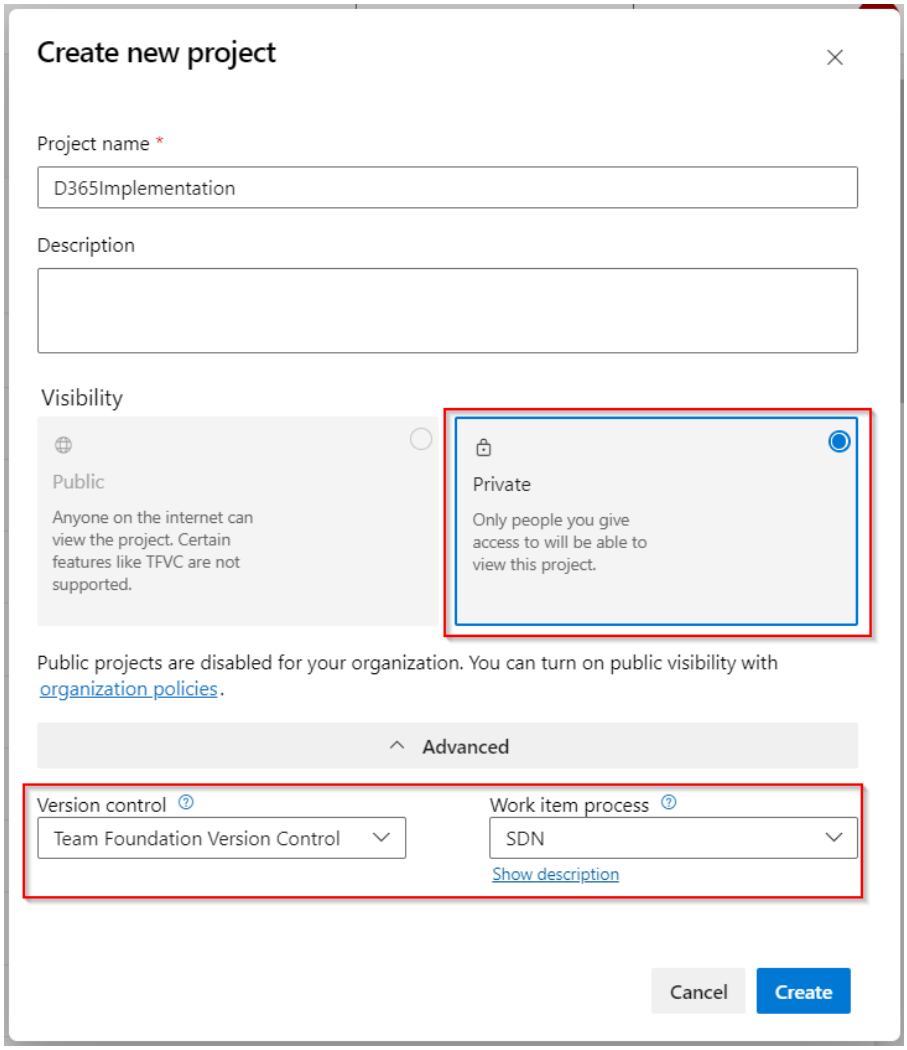
1. Click "New project".
2. Click "Advanced".



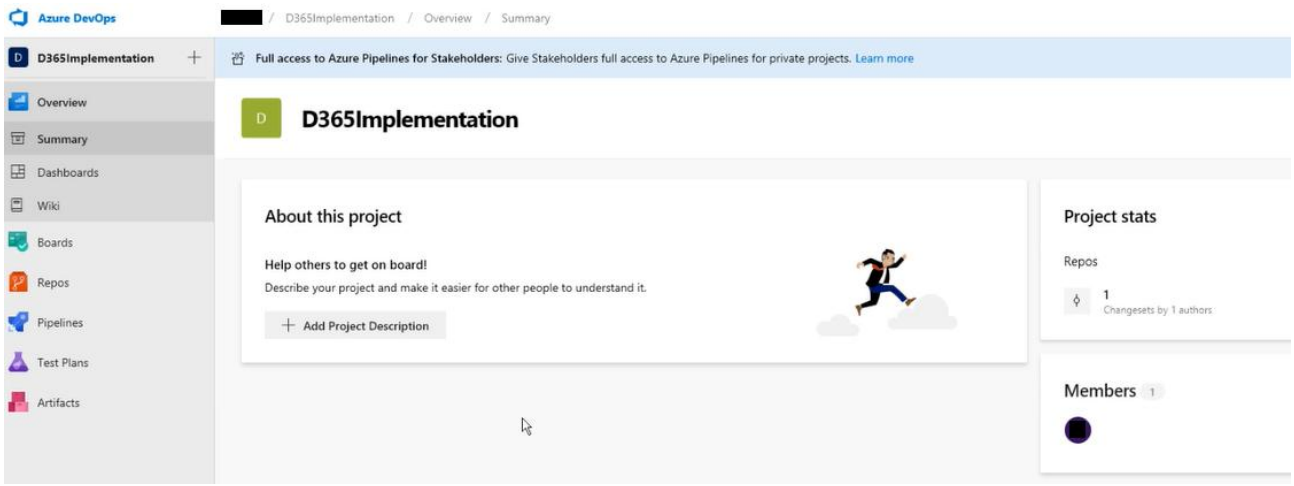
3. Change the Project name.



4. Select Private (under the Advanced section).
5. Fill in the fields as indicated below:
   a. **Version control:** Team Foundation Version Control;
   b. **Work item process:** SDN.

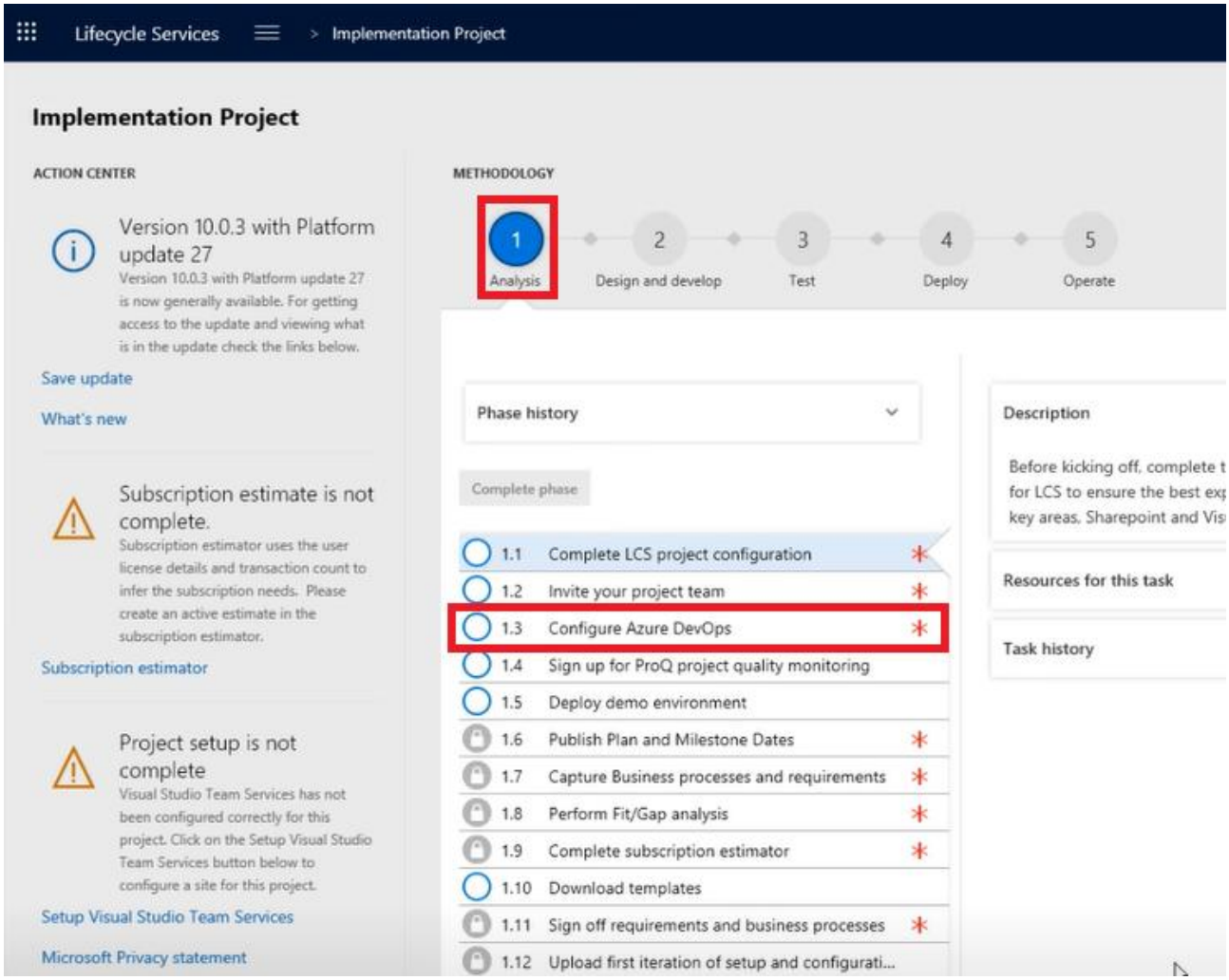


6. Click "Create".

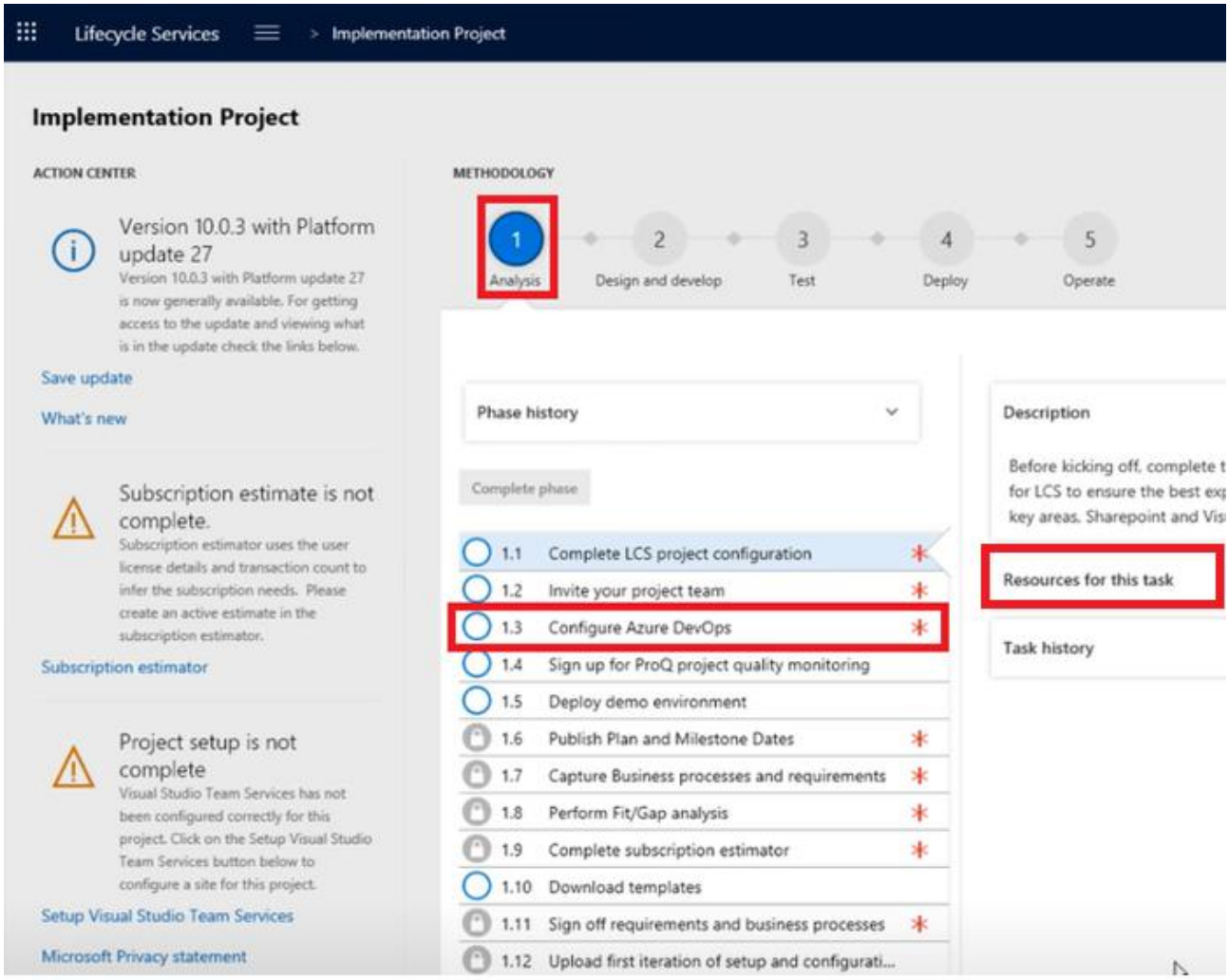


2.2.2 Copy the Azure DevOps URL to LCS

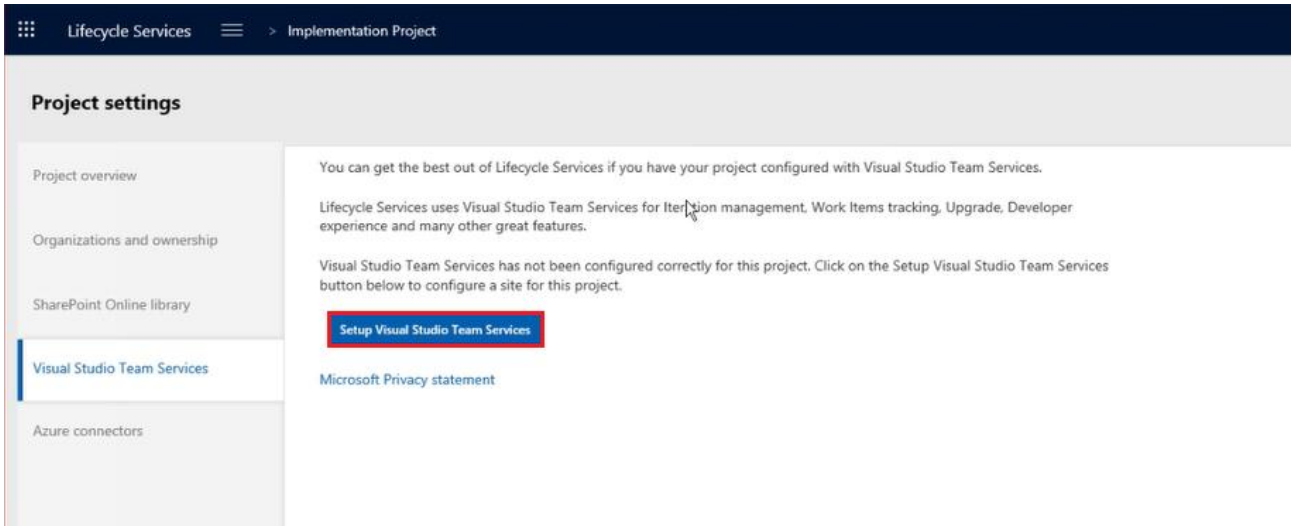
1. Open LCS (link: https://lcs.dynamics.com/v2) and click the project.
2. On the list of the points of the Analysis phase, select point 1.3 "Configure Azure DevOps".



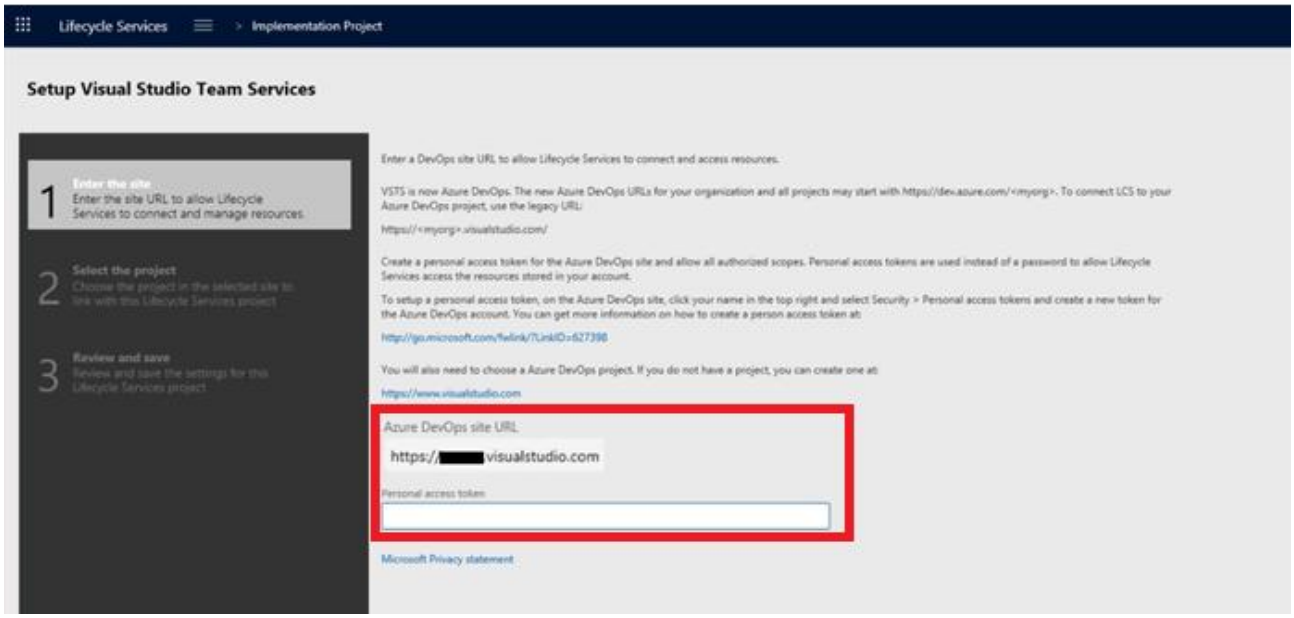
3. Click "Resources for this task".



4. Click the "Setup Visual Studio Team Services" button.

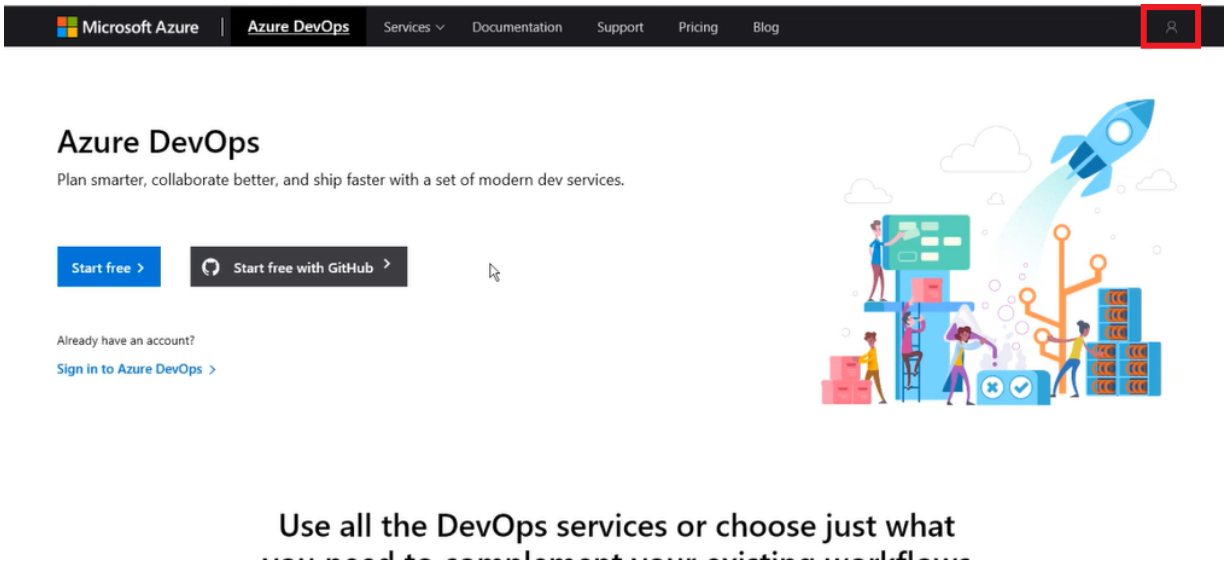


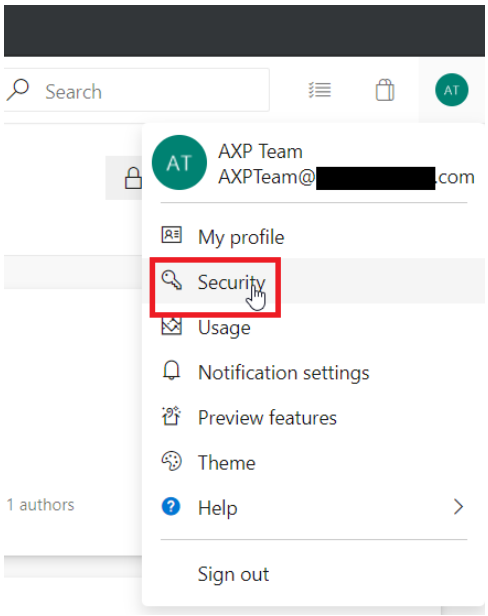
5. Paste the DevOps URL in the Azure DevOps site URL field. If it doesn't work, please insert the old DevOps URL as in the screenshot below.



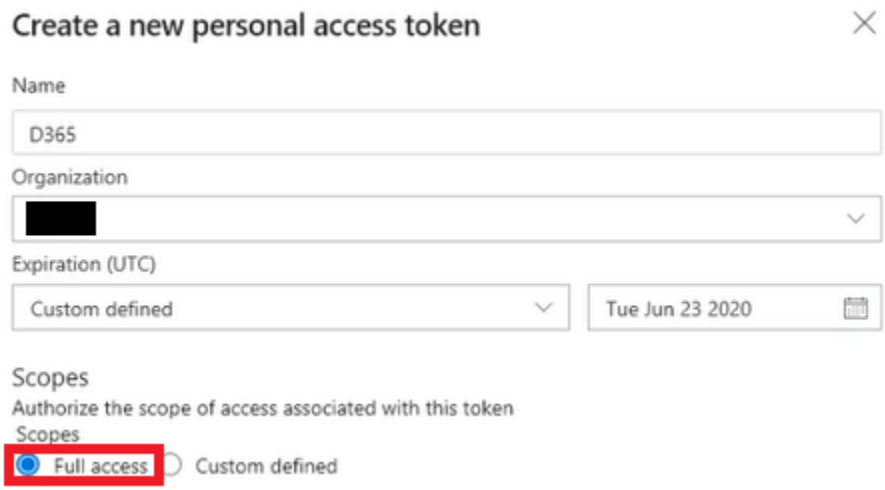
2.2.3 Create a personal access token on DevOps

1. Click your name code on the right side > **Security** > **New token**.

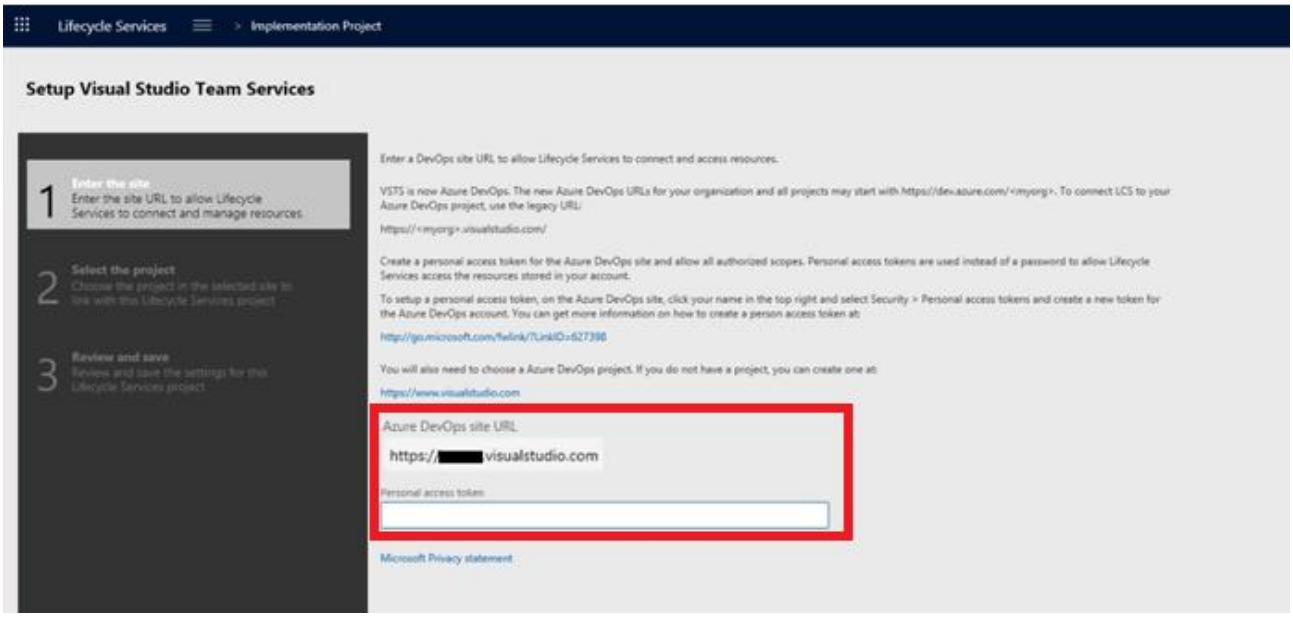




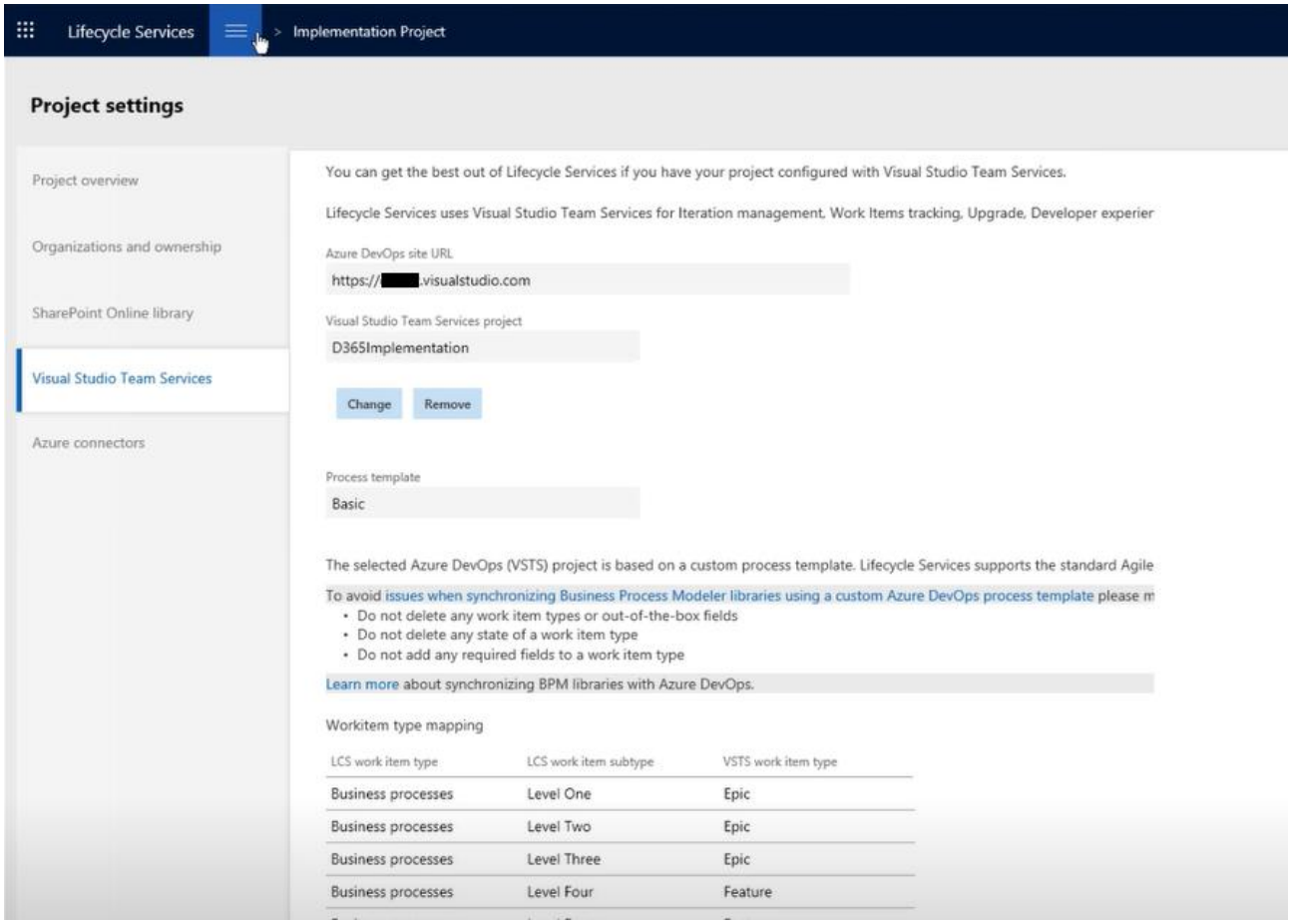
2. Tick on "Full access". Then click "Create".



3. Save and copy the token and paste it to LCS.



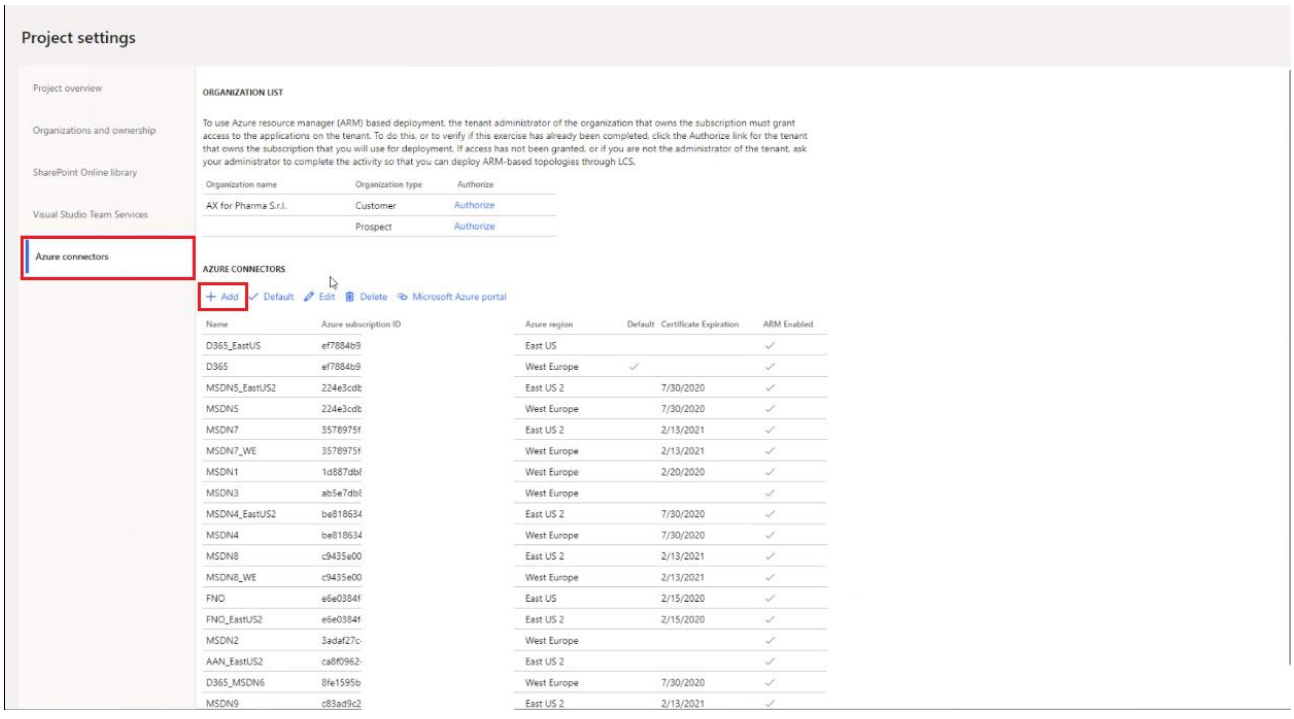
4. Click "Continue".



5. Select the Visual Studio Team Services project dropdown to link with this Lifecycle Services project.
6. Click "Continue".
7. Click "Save".

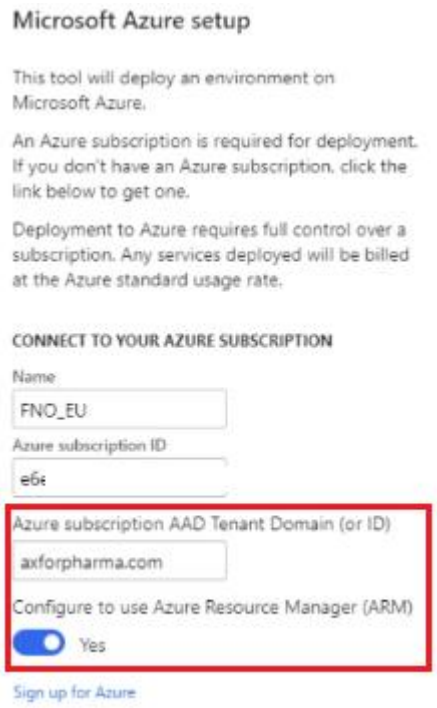
2.2.4 Add Azure Connector to LCS

1. Access LCS, go to **Project settings > Azure connectors** and click the button **Add**.

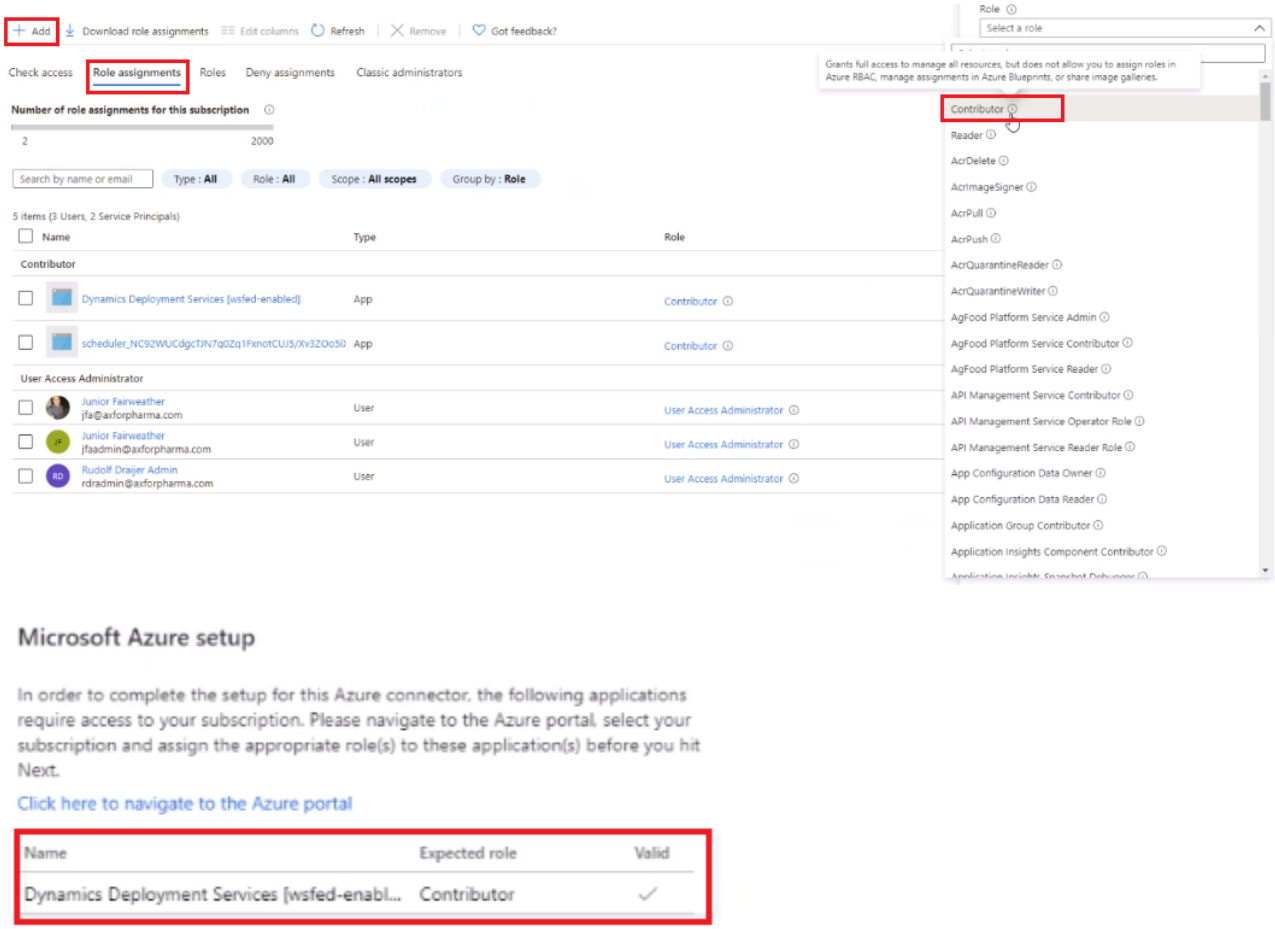


2. Enter the name of the connector and the **Azure subscription ID** (This is the ID connected to the Azure account found in **Subscriptions**).

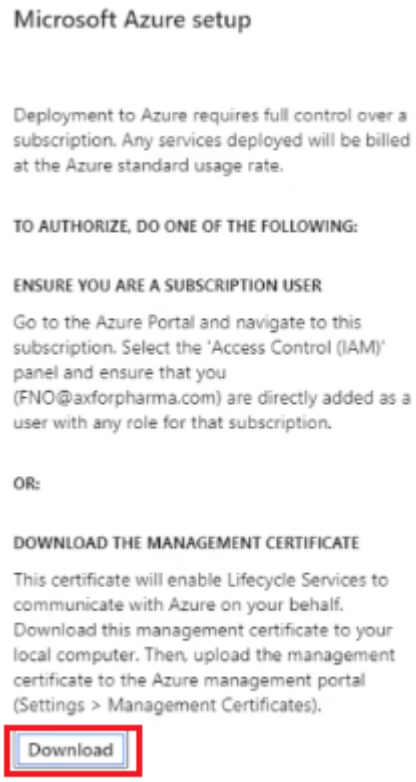
3. Enter the **Azure subscription AAD Tenant Domain** and set the **Configure to use Azure Resource Manager (ARM)** to "Yes".



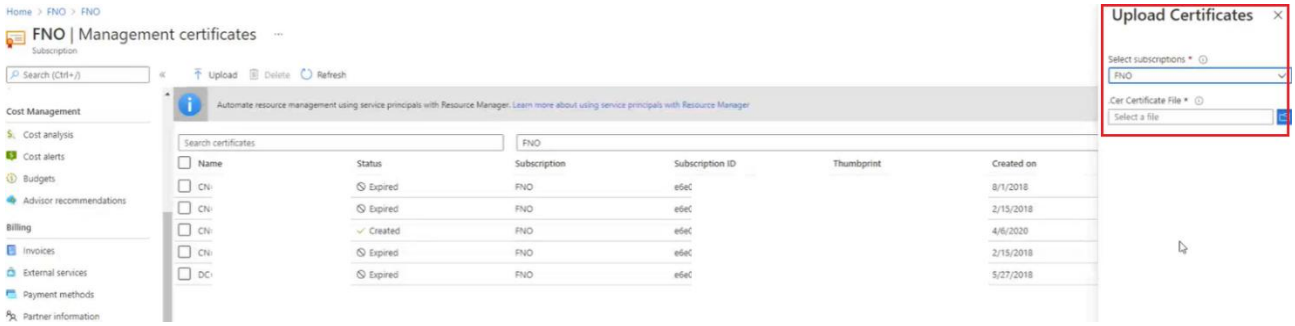
4. Access the Azure portal, select the used subscription and assign it the "Contributor" **Role** (**Access control > Role assignment > Add > Add role assignment**). Note: under the field **Select** the user should pick the option "Dynamics Deployment Services".



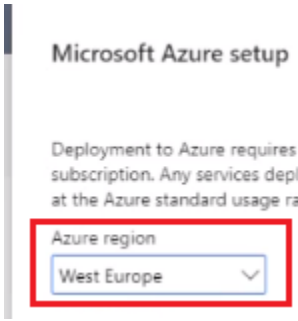
5. Go back to LCS and download the management certificate by clicking on **Download.**



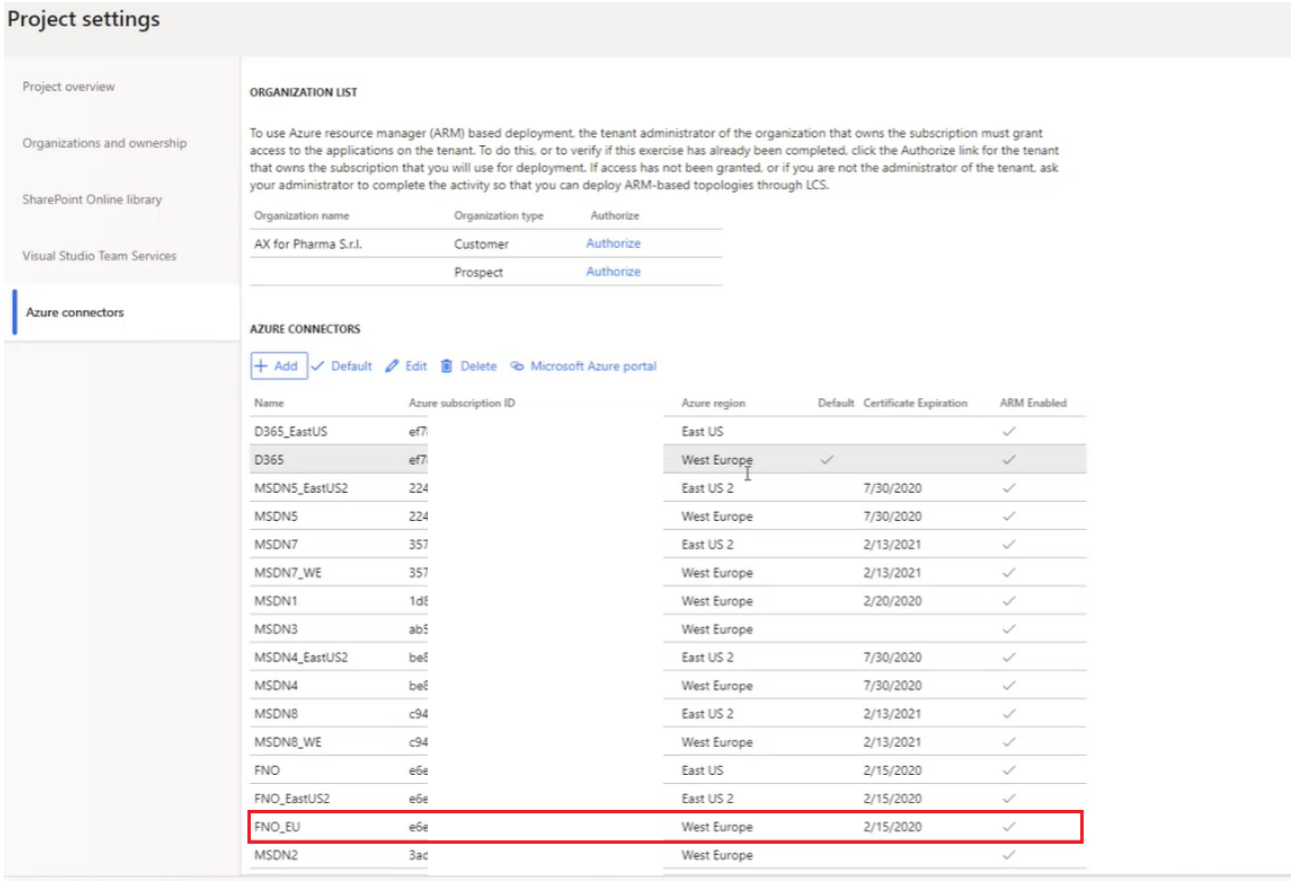
6. Access the Azure portal, go to **Setting > Management certificate** and upload the management certificate downloaded during step 5.



7. Go back to LCS and select the **Azure region** (the region that will host the servers of the virtual machines).

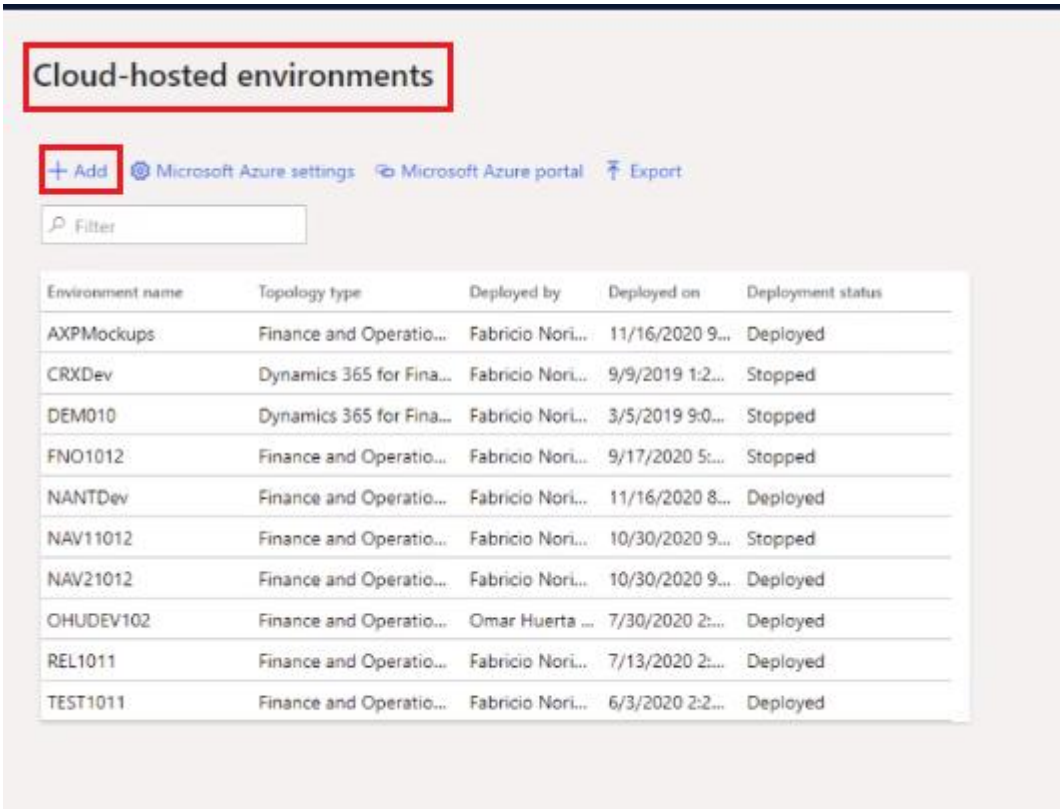


8. The connector has been added in **Azure connectors.**

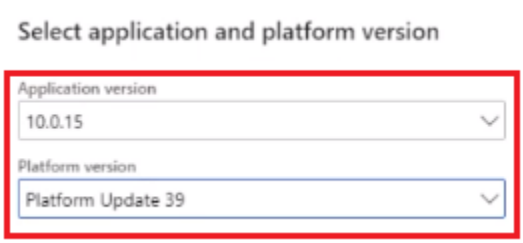


2.2.5 Create the Development environment

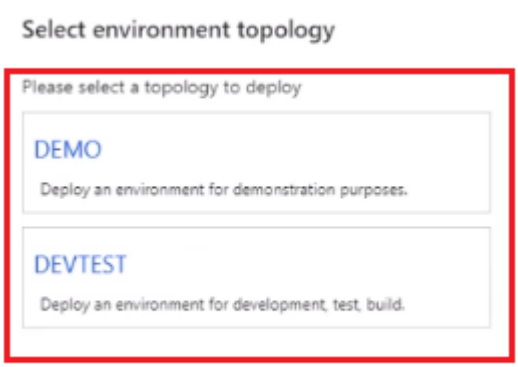
1. Access LCS, go to **Cloud hosted environments** and click **Add.**

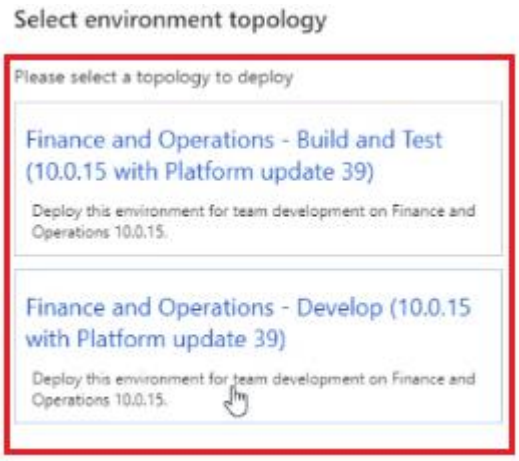


2. Select the **Application version** and the **Platform version** (check with SDN the correct values to select).

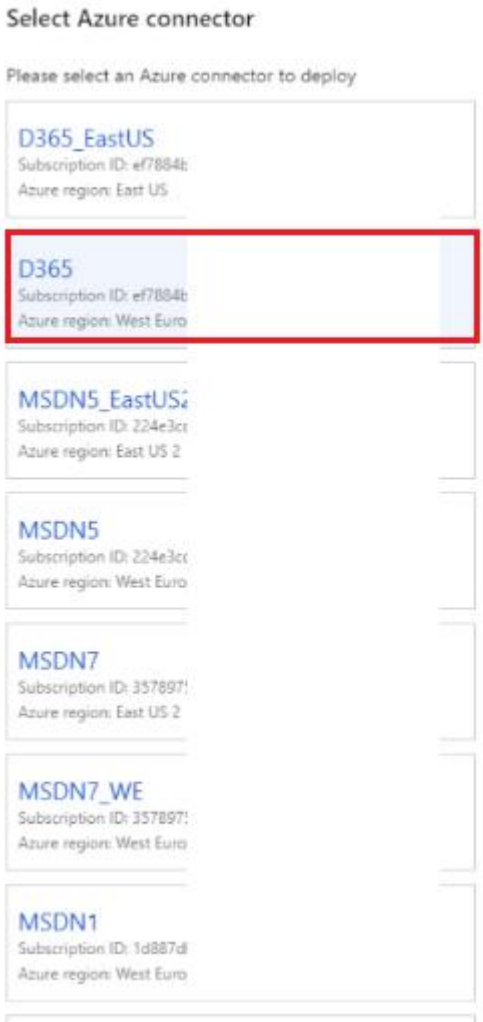


3. Select the environment topology “DEVTEST” – “Finance and Operations - Develop”.

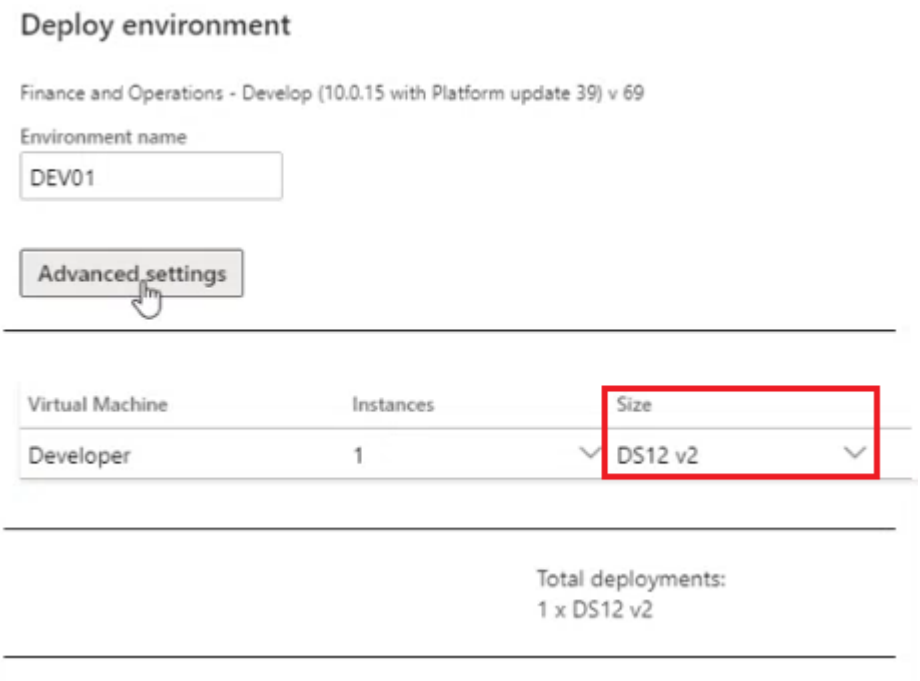




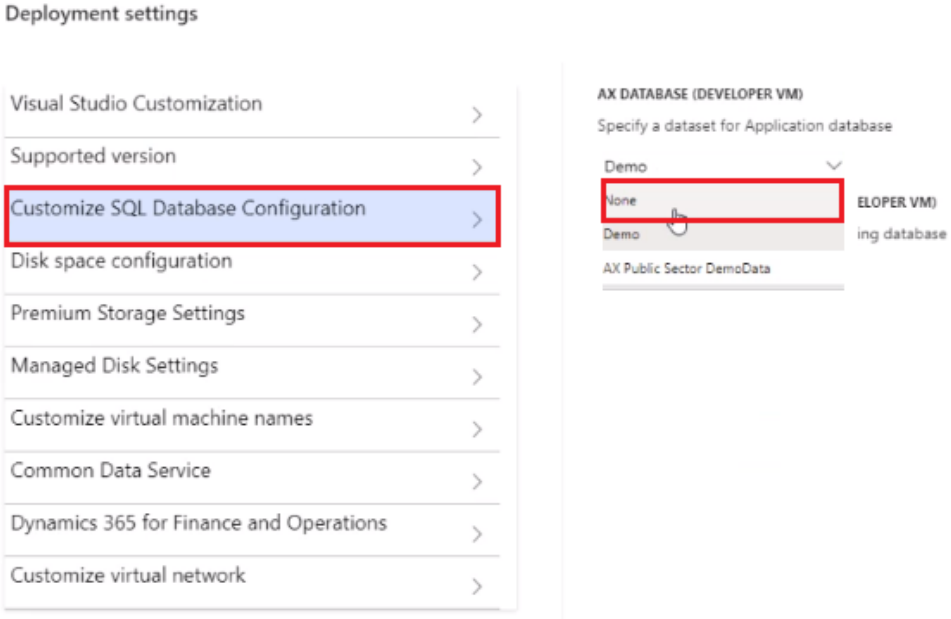
4. Select the **Azure connector** configured in paragraph 2.2.4.



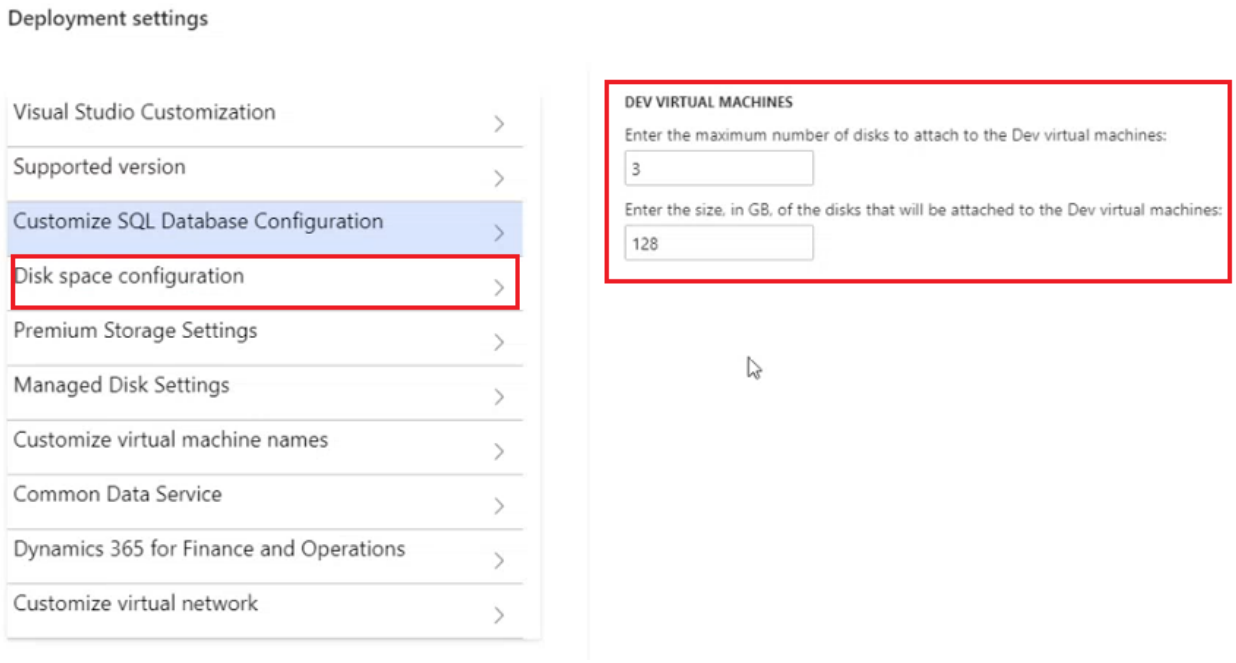
5. Select the virtual machine **Size** (e.g., “E4v3” - check with SDN the correct value to select).



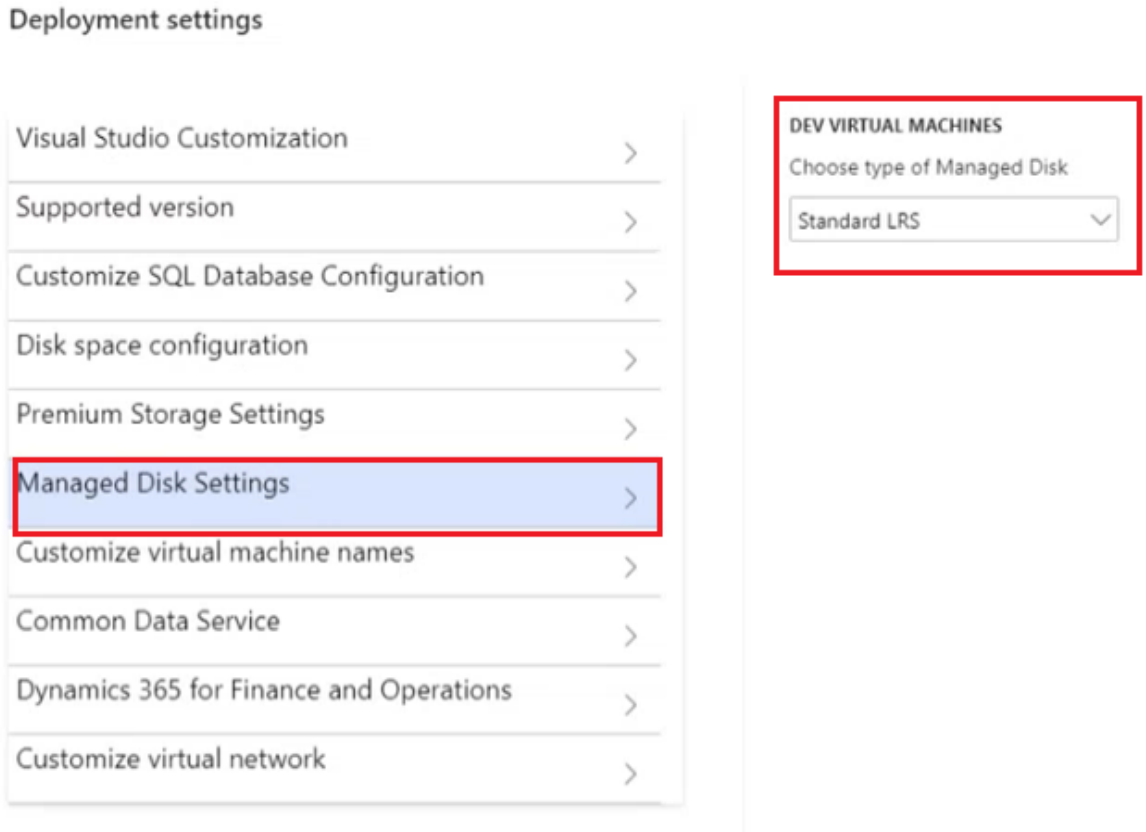
6. Go to **Advanced settings > Customize SQL Database Configuration** and select the environment database to “None”.



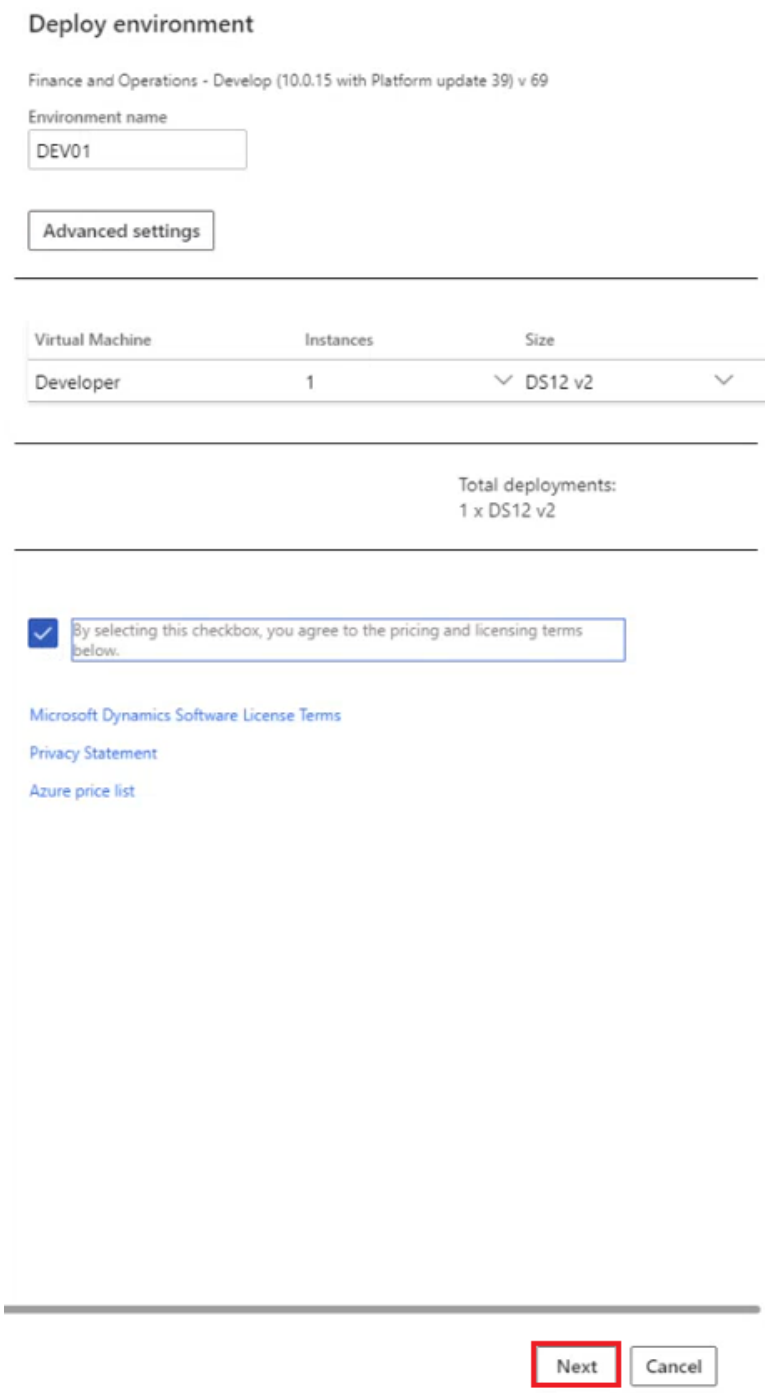
7. Go to **Advanced settings > Disk space configuration** and enter the number of disks to attach to the virtual machines (at least 3) and the size in GB of the disks (at least 128 GB).



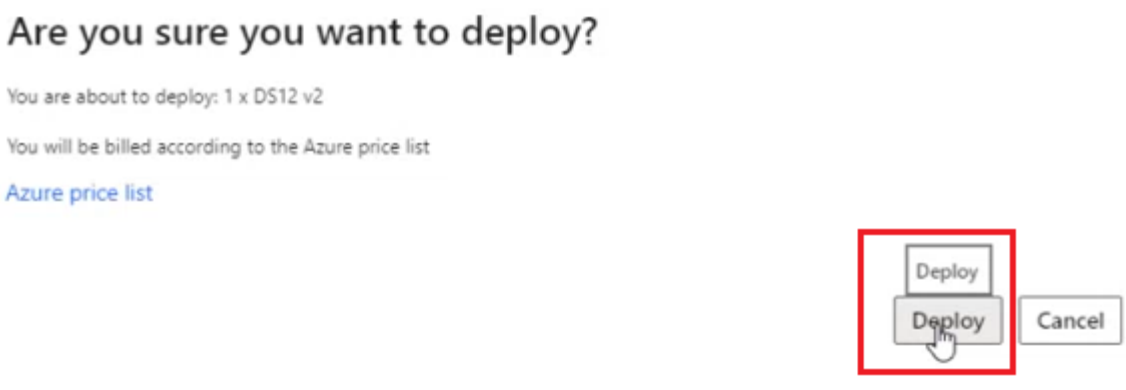
8. Go to **Advanced settings > Managed Disk Settings,** choose the type of disk and click **Done**.



9. Tick the checkbox to agree to Azure pricing and licensing terms and click on **Next.**



10. Click on **Deploy.**



3. Mobile Application

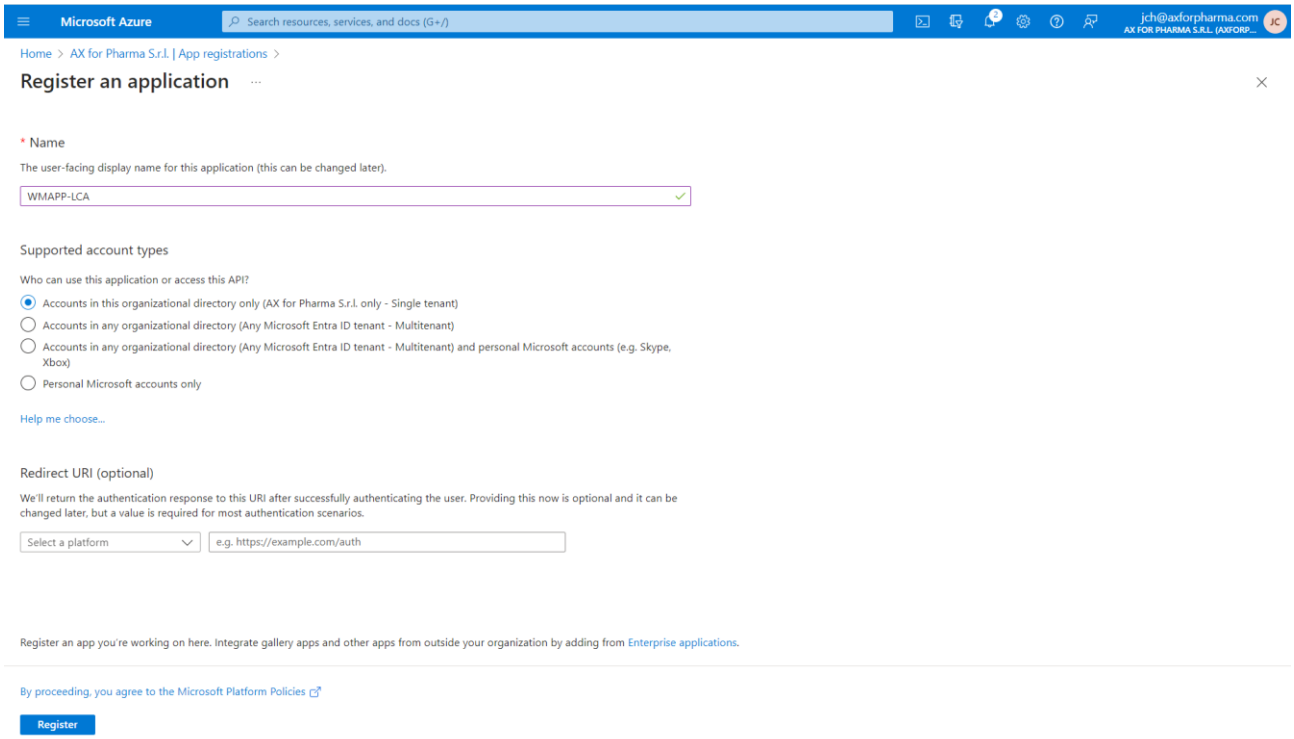
3.1 Authentication method

The Warehouse management app currently supports the device code flow as user-based authentication.

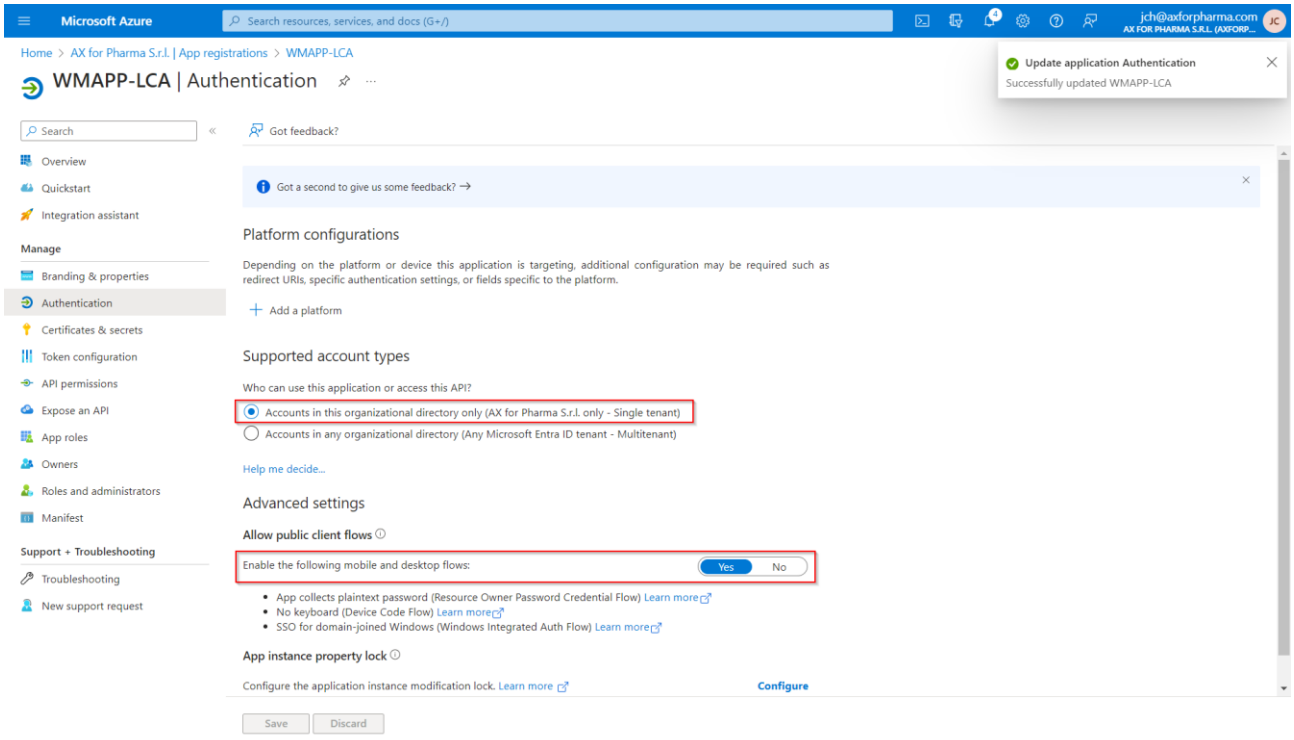
You must decide if the device code represents the device itself or a certain user who is going to use the device. If the device code represents the device itself, dedicated service users are required to be created for each device whether on the physical scanners or opening on the desktop. If the device code represents a certain user, dedicated service users are required to be created for each user per each device whether on the physical scanners or opening on the desktop.

3.2 Create applications

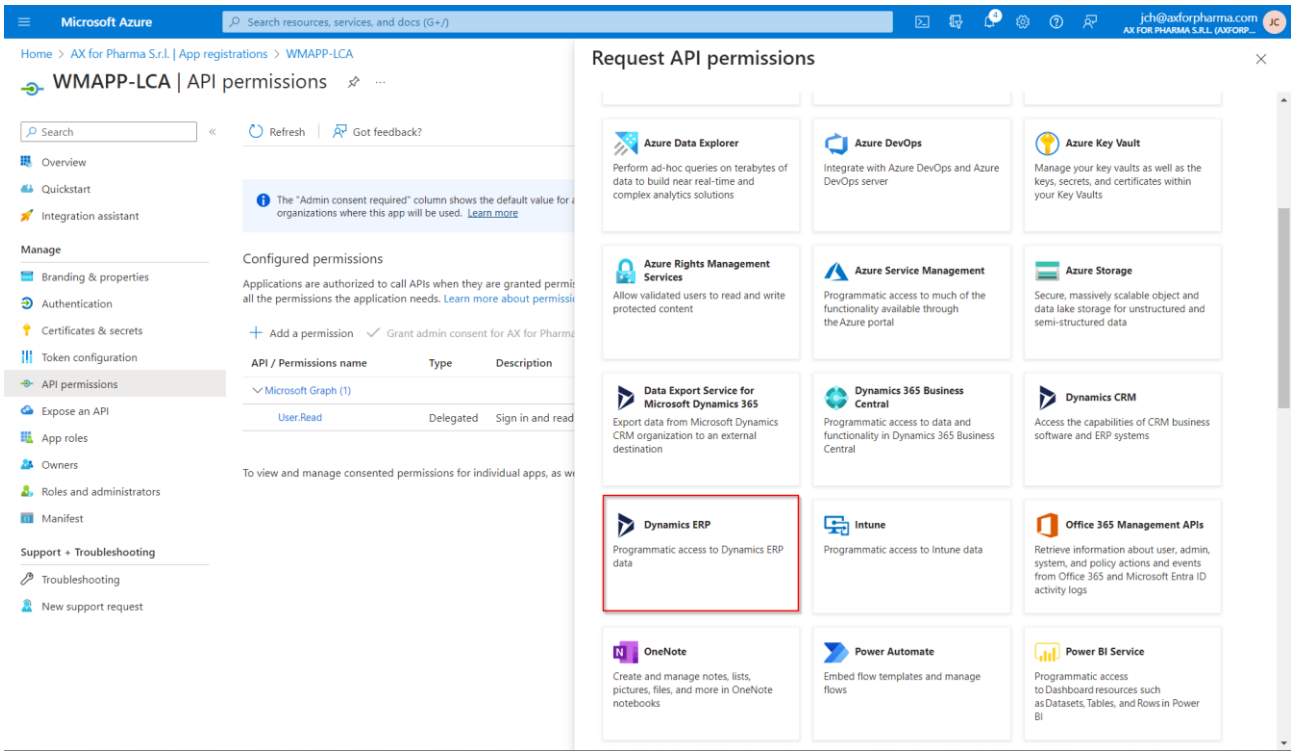
1. Go to Microsoft Azure (link: https://portal.azure.com).
2. Click "Microsoft Entra ID" on the left.
3. In the **Manage** list, click “App registrations”.
4. On the toolbar, select “New registration” to open the **Register an application** wizard.
5. Enter a name for the application, select the **Accounts in this organizational directory only** option, and then select **Register**.

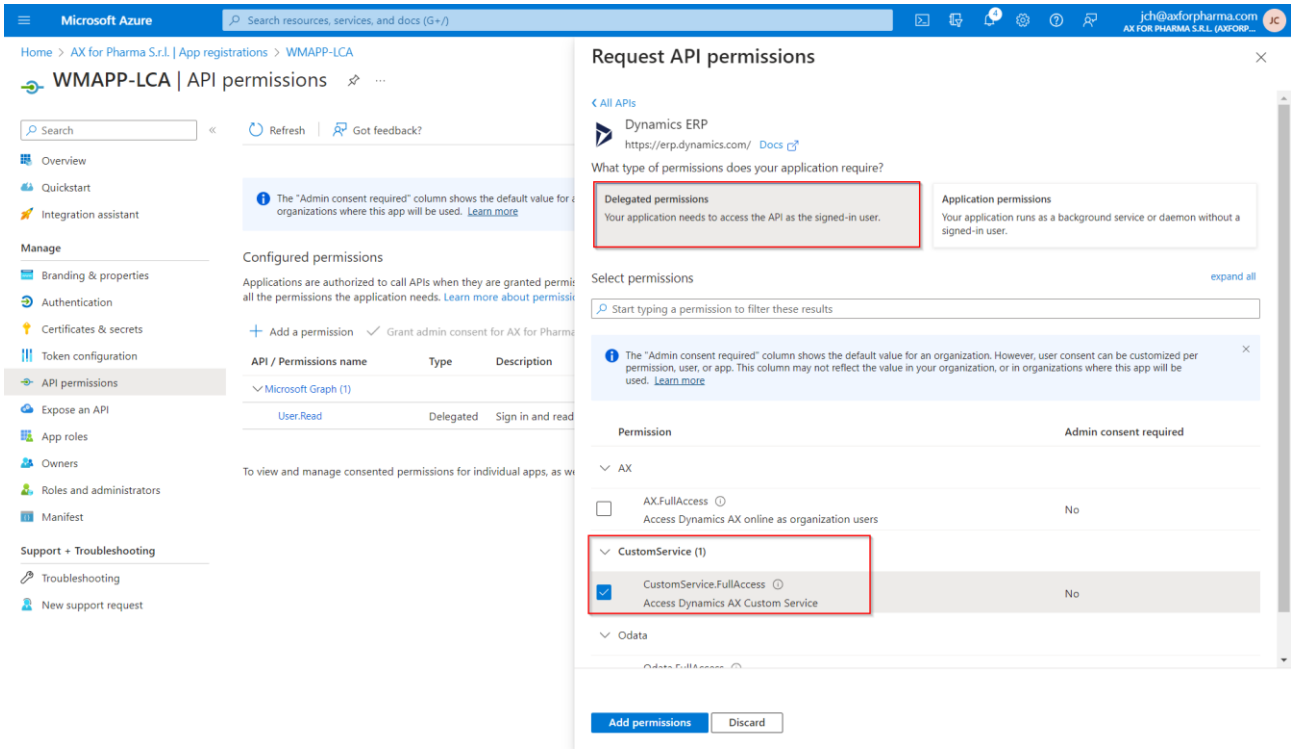


6. Make a note of the **Application (client) ID** value. This ID will be referred to as the *client ID*.
7. In the **Manage** list, select “Authentication”.
8. Set the **Enable the following mobile and desktop flows** option to *Yes* to enable the device code flow for your application. Then select **Save**.

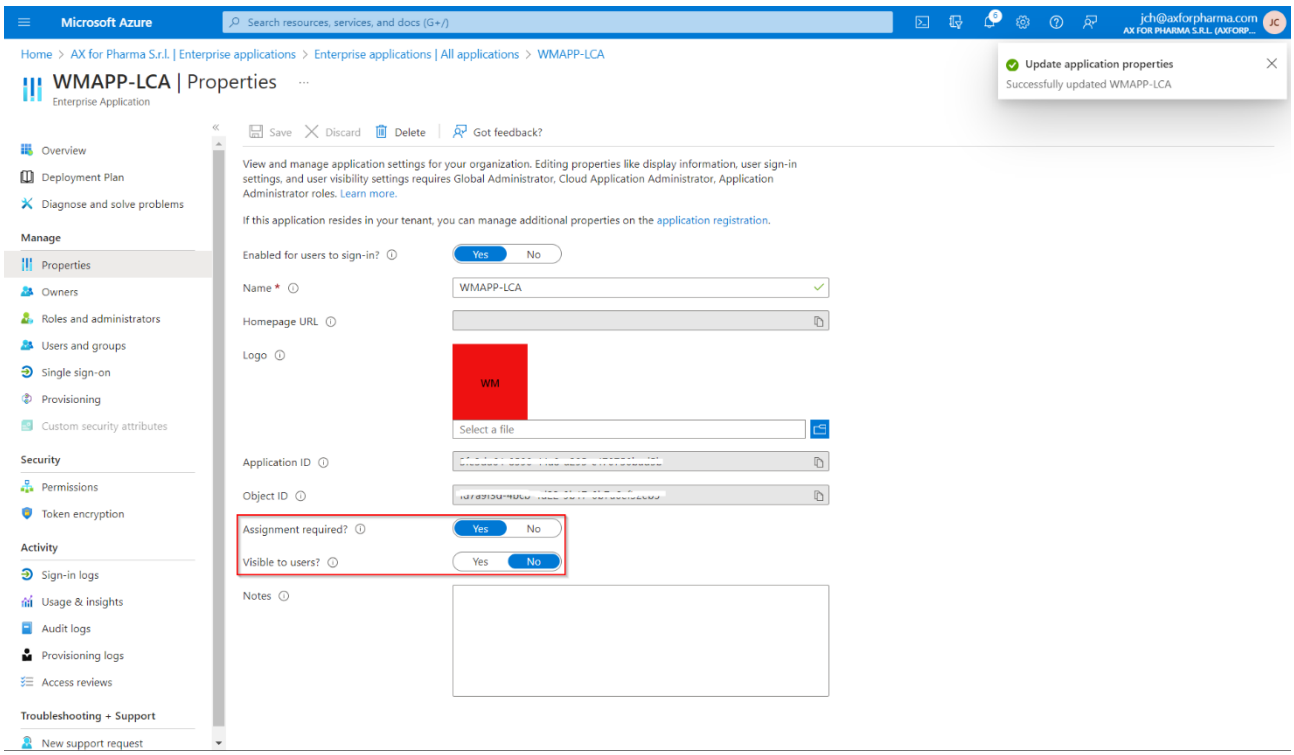


9. In the **Manage** list, select “API permissions”.
10. Click “Add a permission”.
11. In the **Request API permissions** dialog box, on the **Microsoft APIs** tab, select the **Dynamics ERP** tile and then the **Delegated permissions** tile.
    Under **CustomService**, select the **CustomService.FullAccess** checkbox. Finally, select **Add permissions** to save changes.





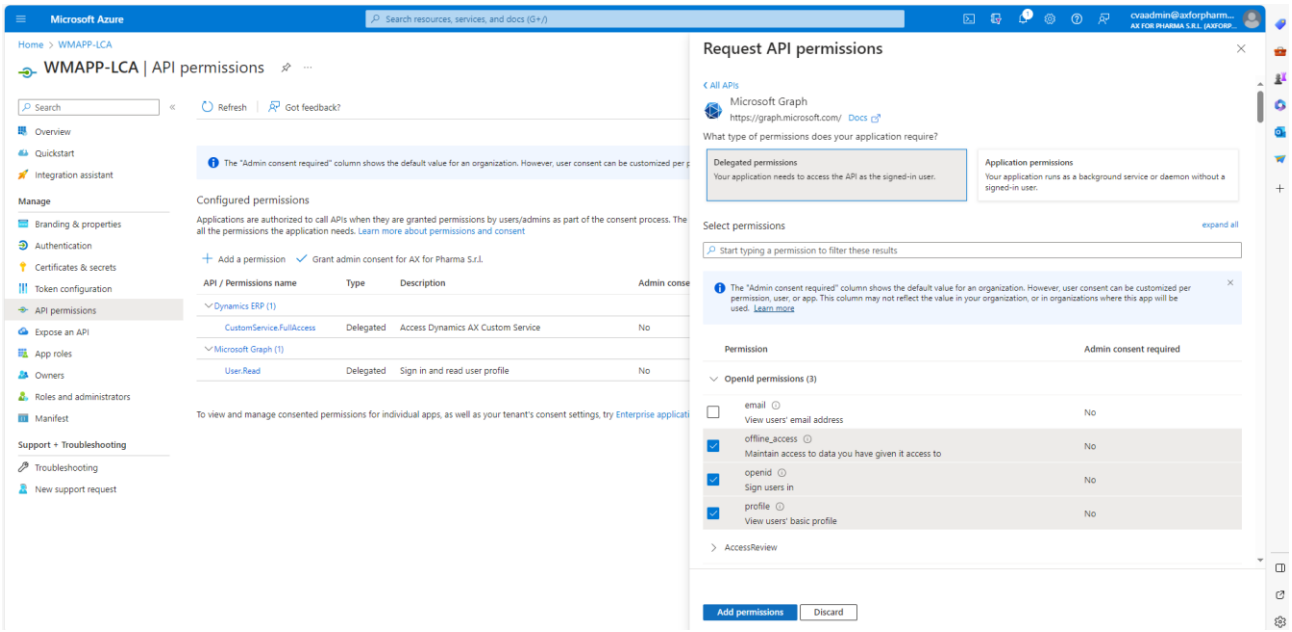
12. On the left navigation pane, click “Microsoft Entra ID”.
13. In the **Manage** list, click “Enterprise applications”. Then, in the new **Manage** list, select the **All applications** tab.
14. In the search form, enter the name that you entered for the app earlier in this procedure. Confirm that the **Application ID** value for the app that's found matches the client ID. Then select the link in the **Name** column to open the properties for the app.
15. In the **Manage** list, click “Properties”.
16. Set the **Assignment required?** option to *Yes* and the **Visible to users?** option to *No*. Then select **Save** on the toolbar.

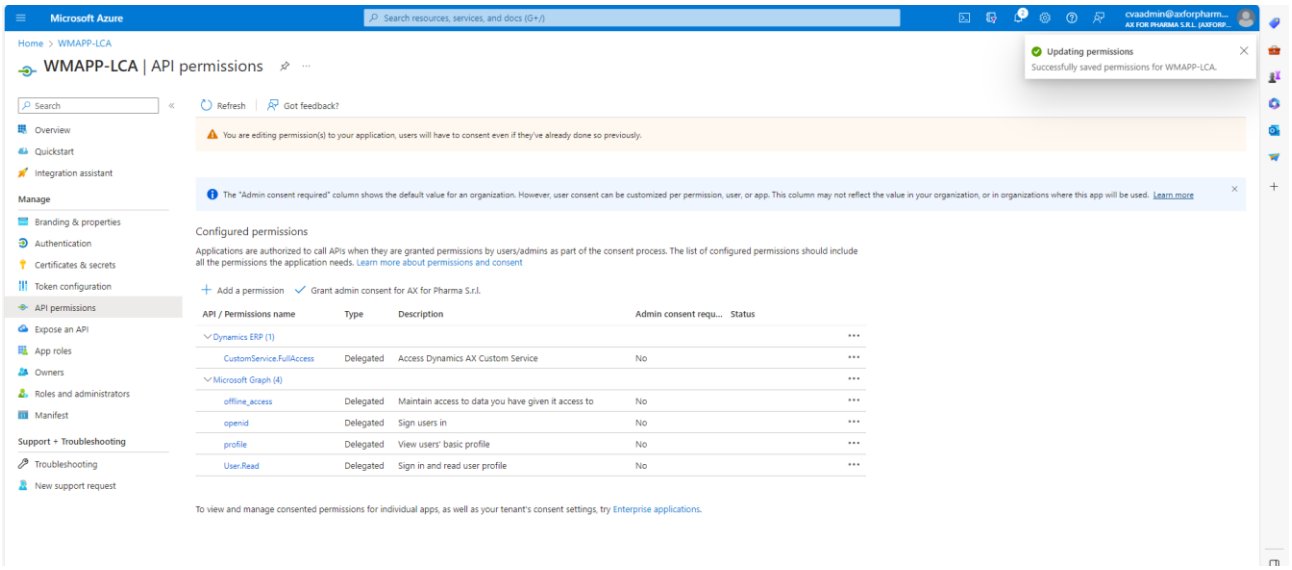


17. In the **Manage** list, select **Users and groups**.
18. On the toolbar, select **Add user/group**.
19. On the **Add Assignment** page, select the link under the **Users** heading.
20. In the **Users** dialog box, select each user that you'll use to authenticate devices with Supply Chain Management.

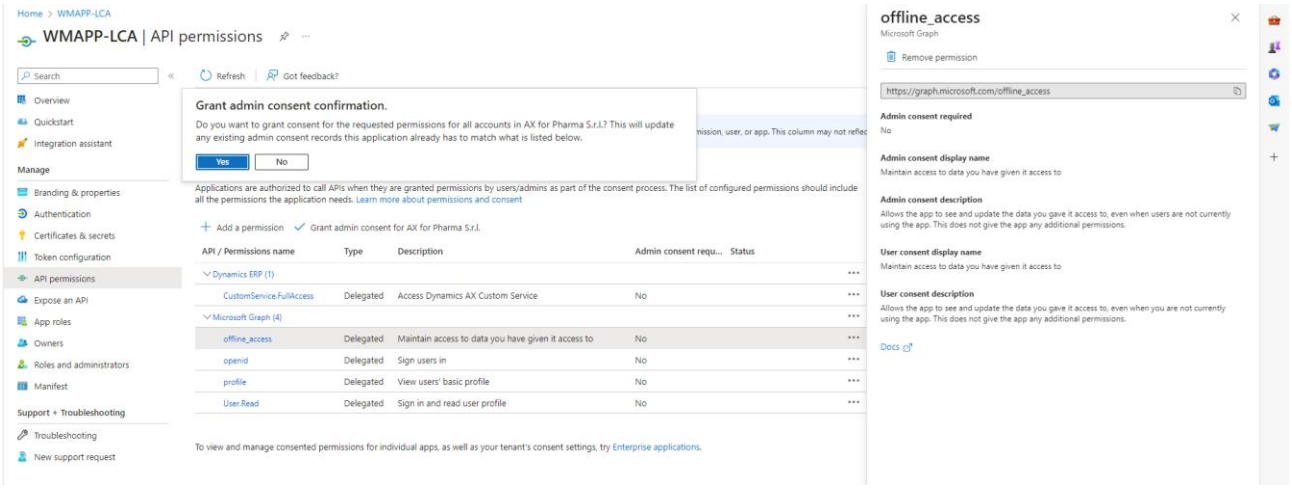
3.3 Grant admin approval

1. Go to Microsoft Azure (link: https://portal.azure.com).
2. Click "Microsoft Entra ID" on the left.
3. In the **Manage** list, click “API permissions”.
4. Select **Add a permission**.
5. In the **Request API permissions** dialog box, on the **Microsoft APIs** tab, select the **Microsoft Graph** tile and then the **Delegated permissions** tile.
   Under **OpenId permissions**, select the **offline_access, openid, profile** checkboxes. Finally, select **Add permissions** to save your changes.

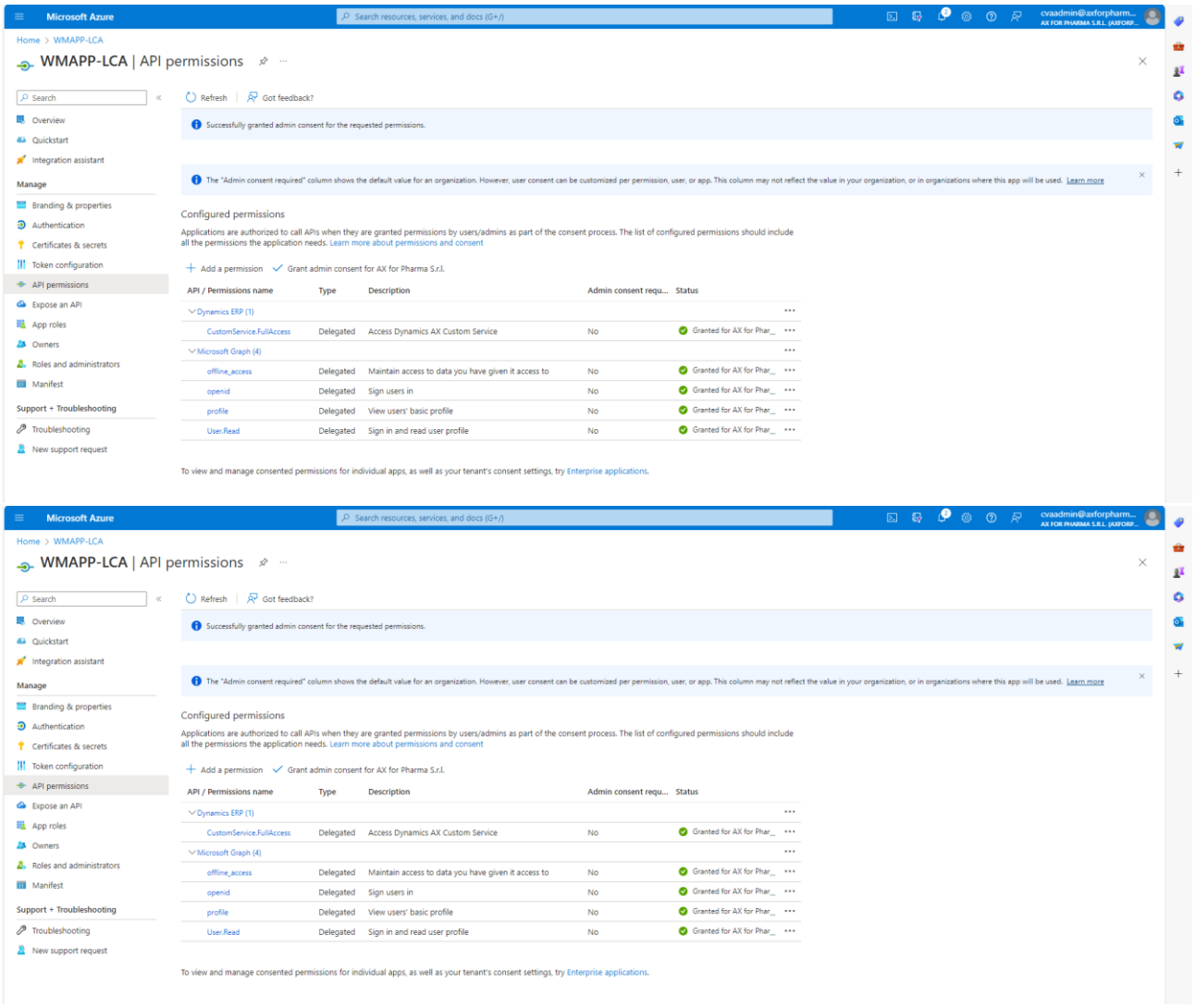




6. Grant admin consent for the organization



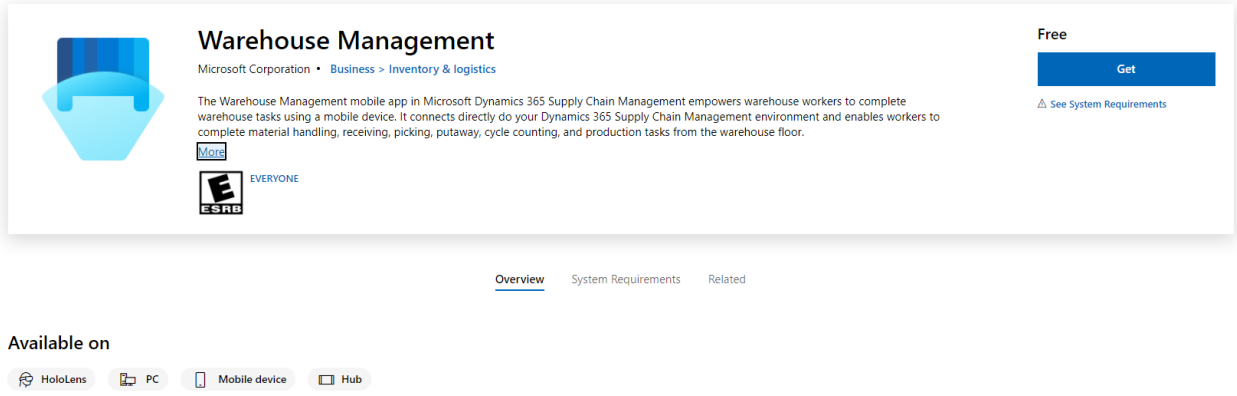
7. Repeat for each API permission



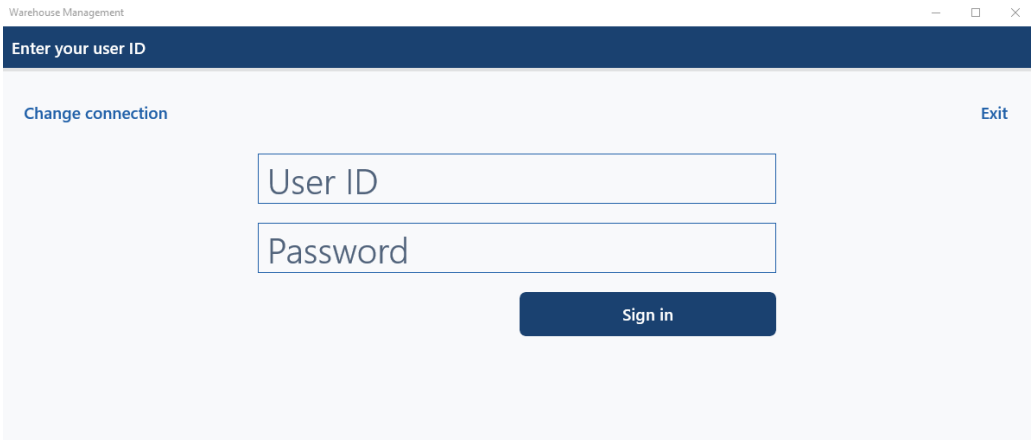
3.4 Install and configure the Warehouse Management app

1. Download the "Warehouse Management" application from the Microsoft or Google Play store and run it.

   Note: Disable automatic updates from the Microsoft or Google play store to ensure control of process changes.



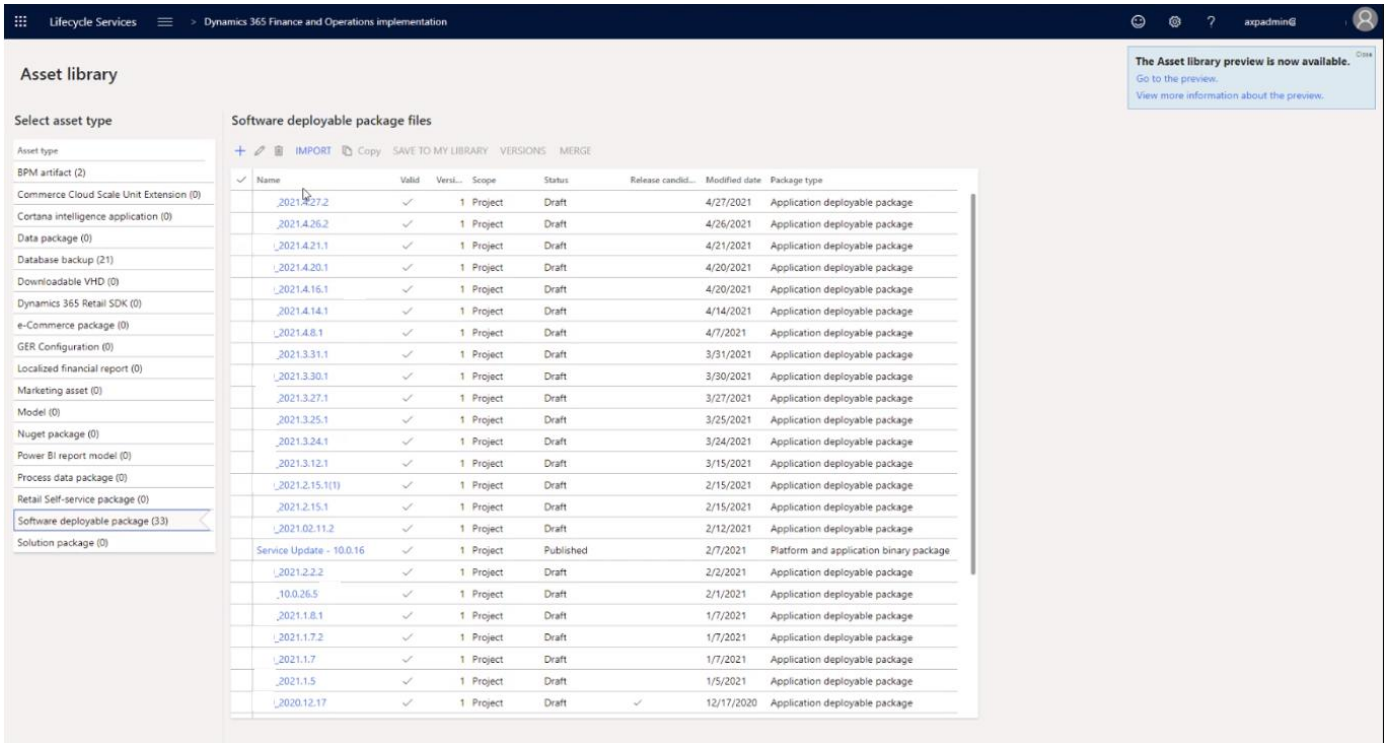
2. Connect the Warehouse Management app to the required Dynamics 365 environment by following Microsoft instructions:
   a. Installation and configuration: [Install the Warehouse Management mobile app - Supply Chain Management | Dynamics 365 | Microsoft Learn]
   b. Authentication method: [User-based authentication - Supply Chain Management | Dynamics 365 | Microsoft Learn]
3. The following app screen appears if everything has been set correctly.



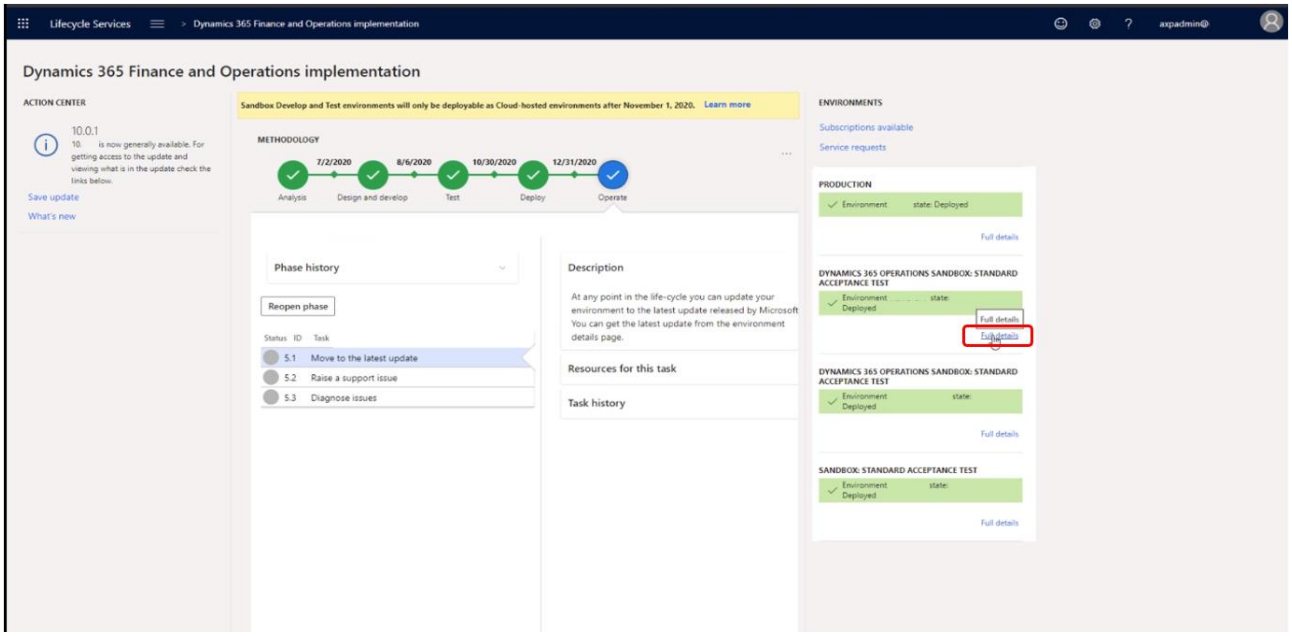
4. INSTALLATION OF THE LIFE SCIENCES SOLUTION COMPONENTS

4.1 Deployment of Life Sciences Solution in Tier 2

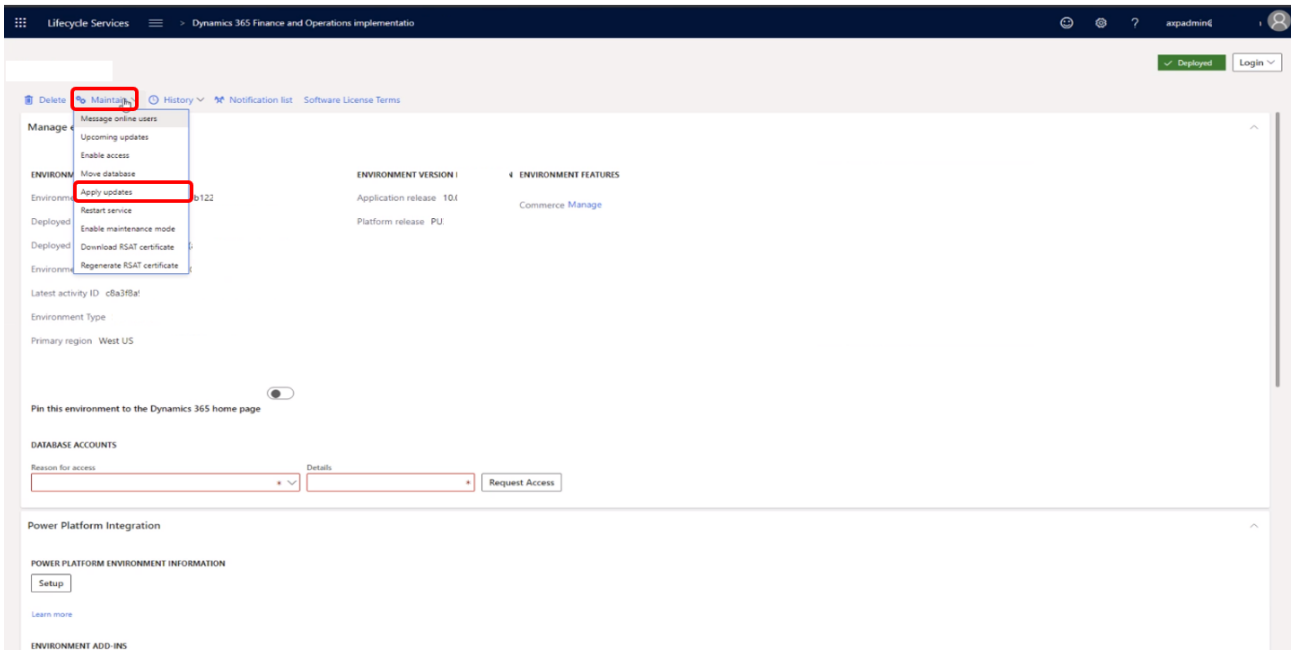
Assumption: The deployable package with licenses and all ISVs required are built and loaded in the asset library.



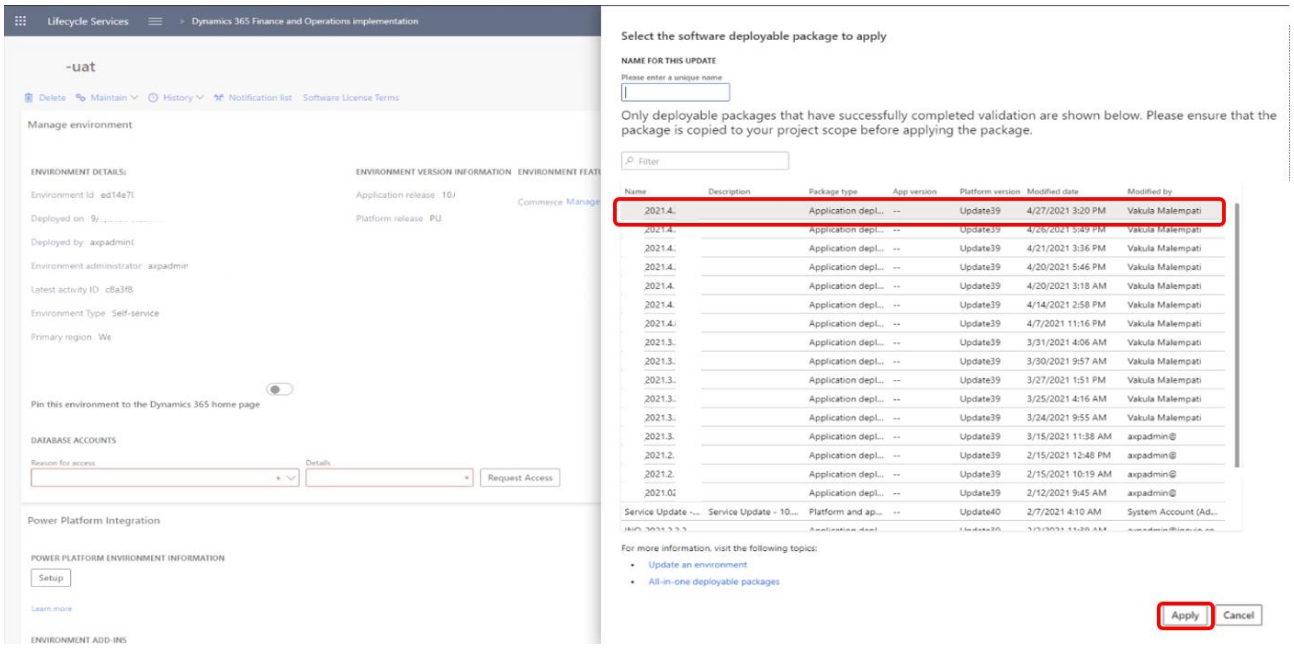
1. Select environment and click **Full details** in the LCS main page.



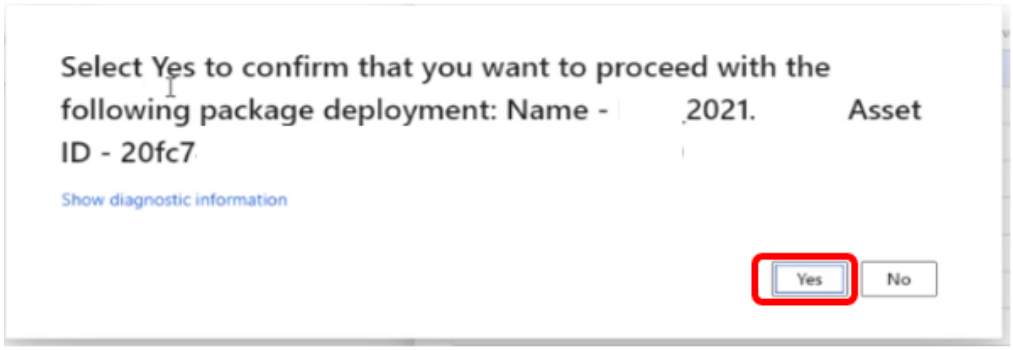
2. Click Maintain > Apply updates.



3. Enter the unique name of the deployable package in the text box and select the package from the list; hence click Apply.



4. Click Yes on the dialog box.

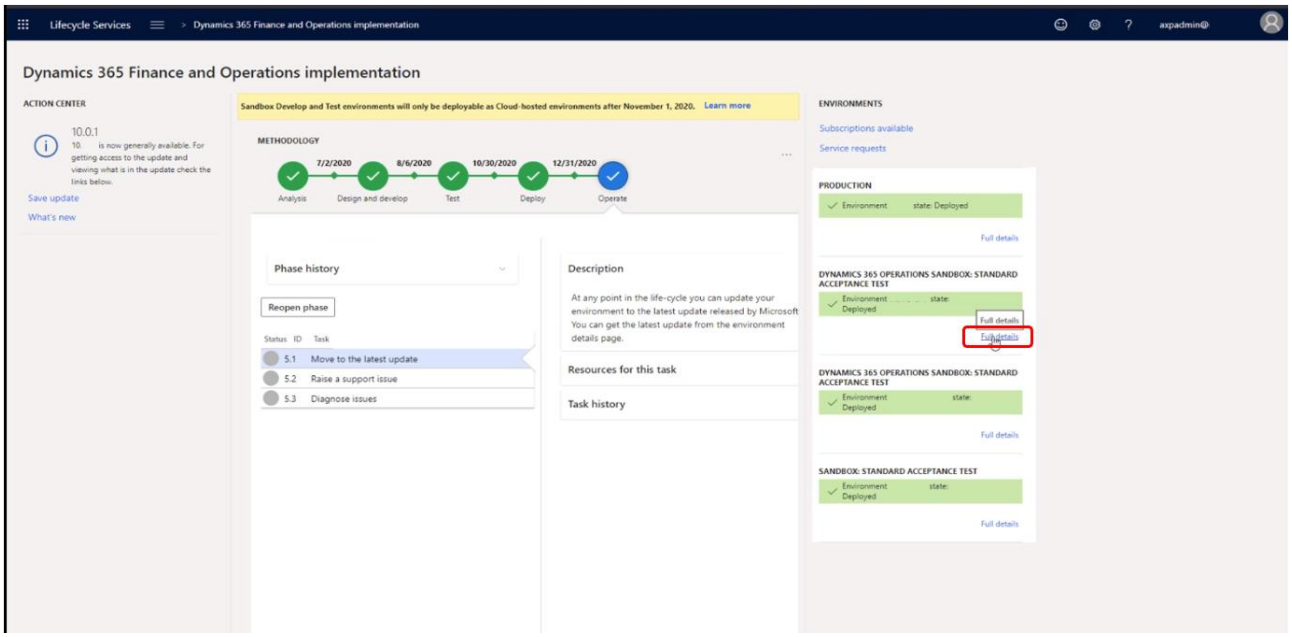


The system provides the status of the package deployment with a progress bar: an email is sent upon completion.

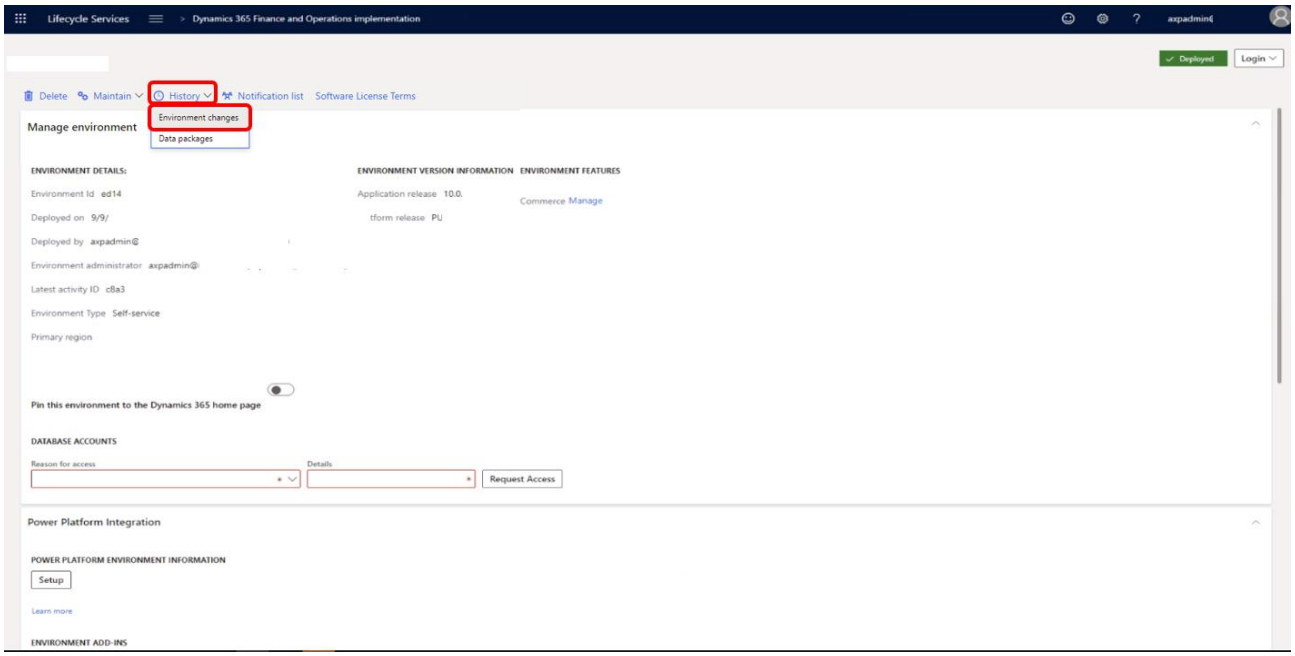
4.2 Deployment of Life Sciences Solution in the Production environment

Once the package is deployed, it needs to be applied to production. Hence, the package has to be marked as a release candidate in the official sandbox environment.

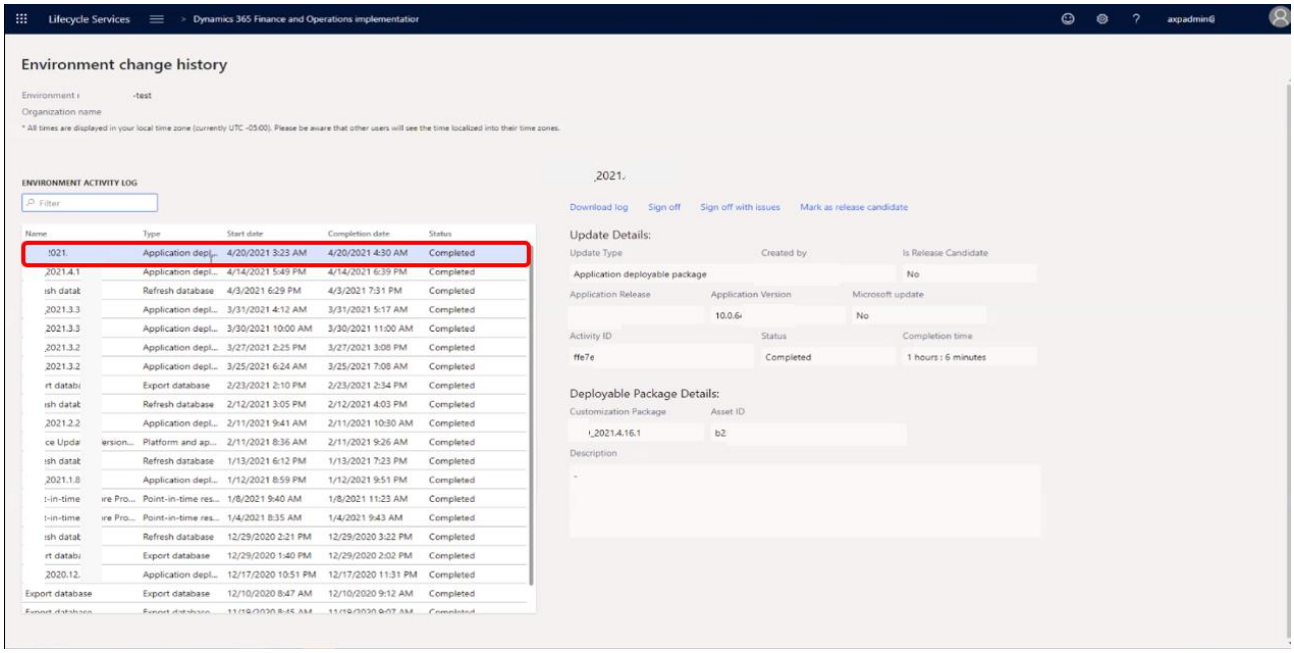
1. Select the environment and click Full details in LCS main page.



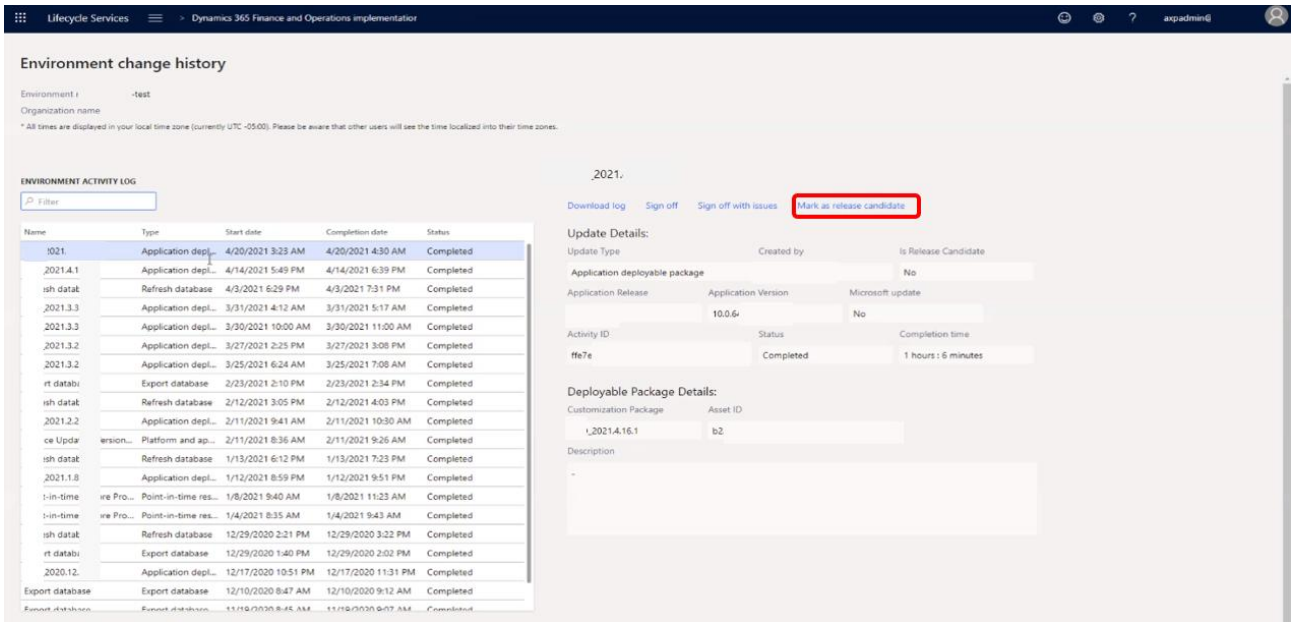
2. Click History > Environment changes.



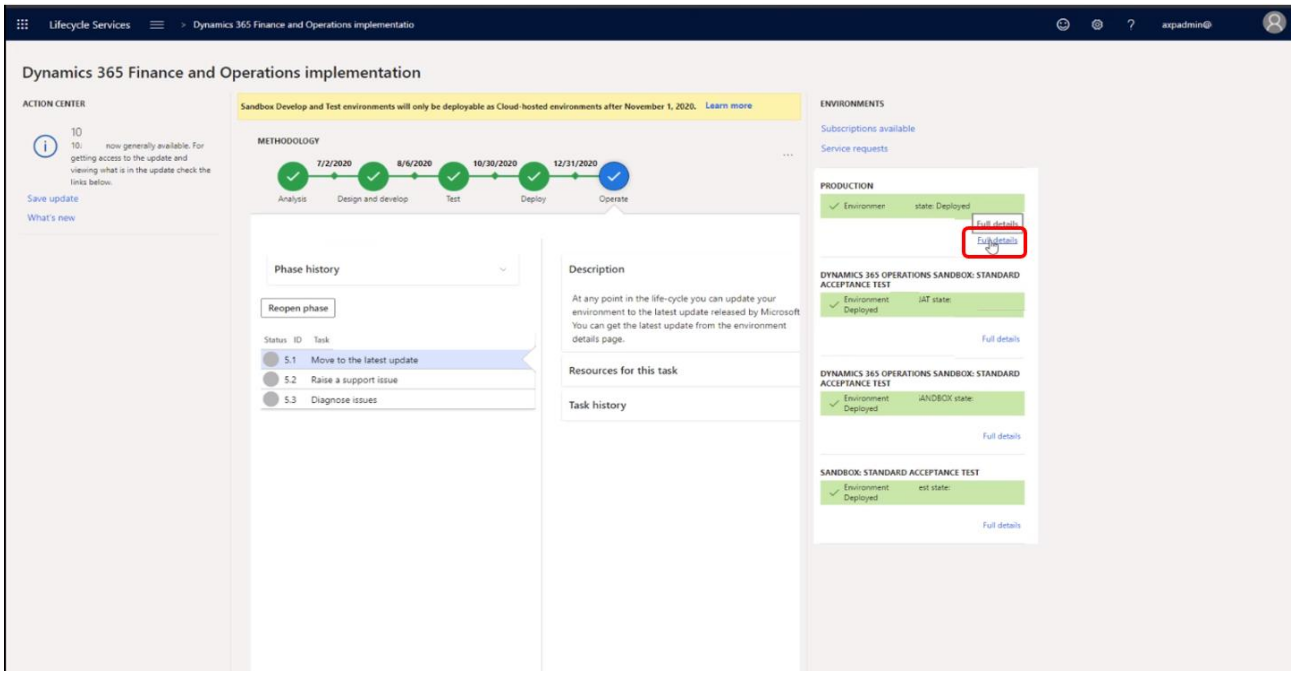
3. Select the package applied.



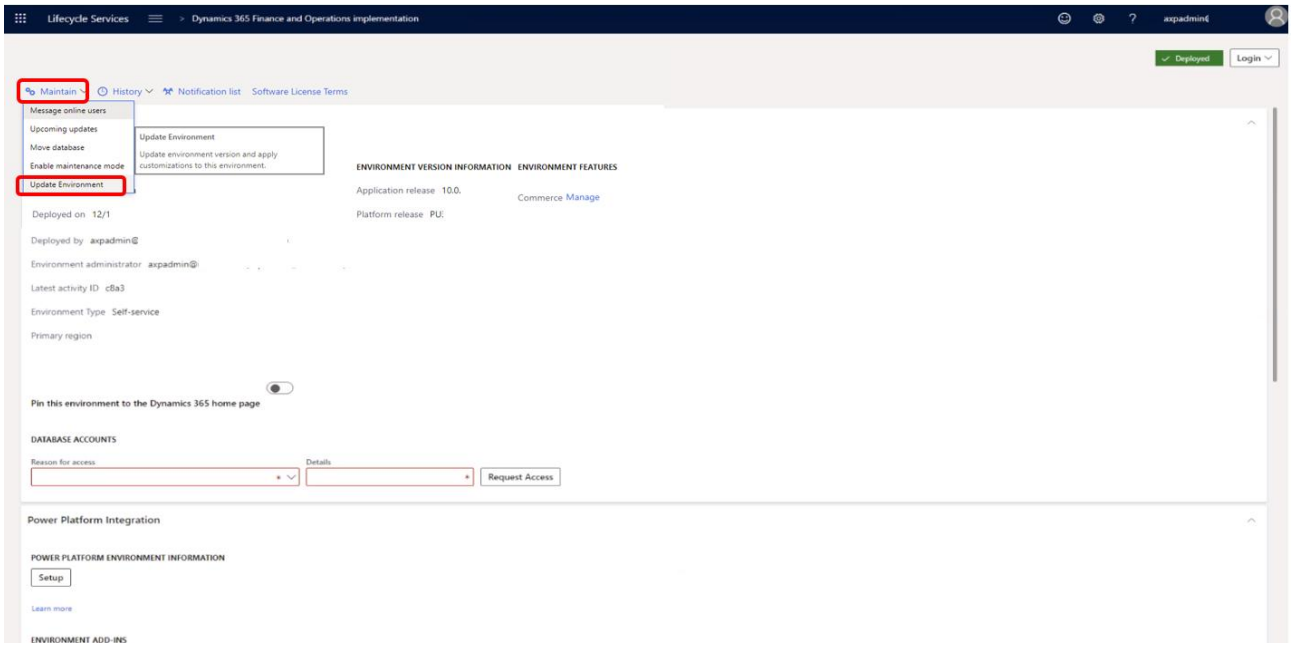
4. Click Mark as release candidate. The value in the Is Release Candidate field changes to "Yes".



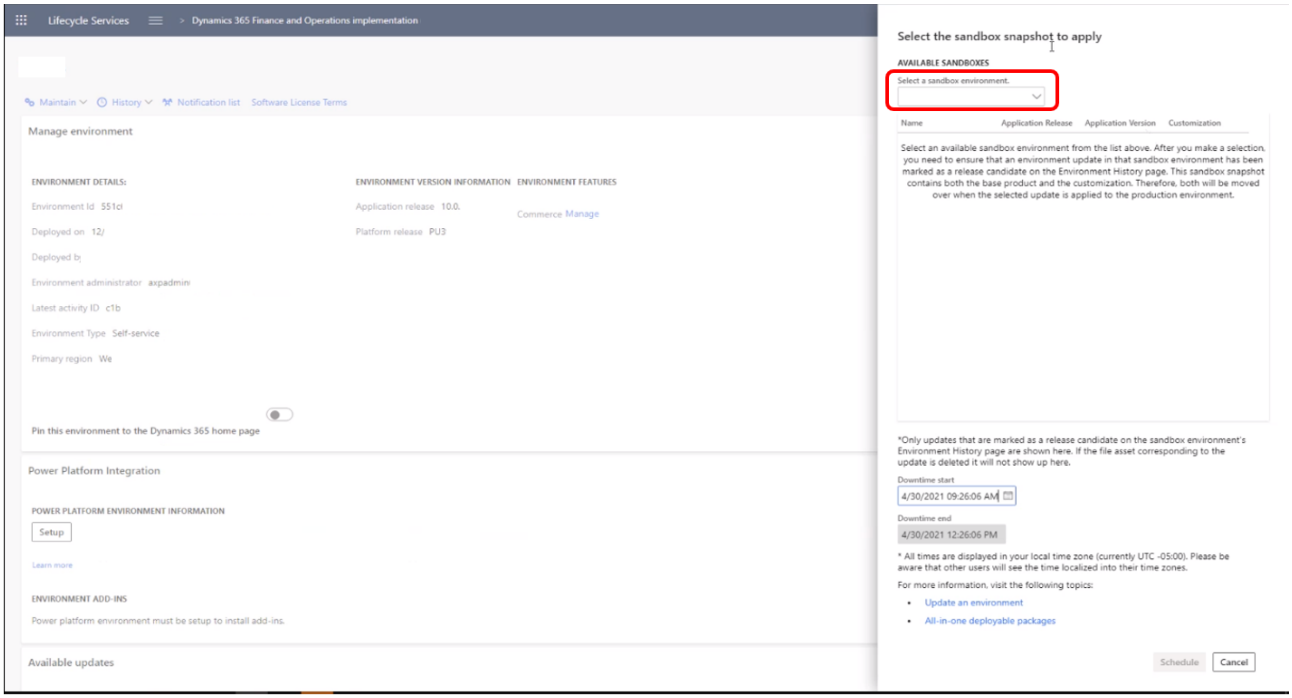
5. Go back to the LCS main page and select the production environment and click Full details.



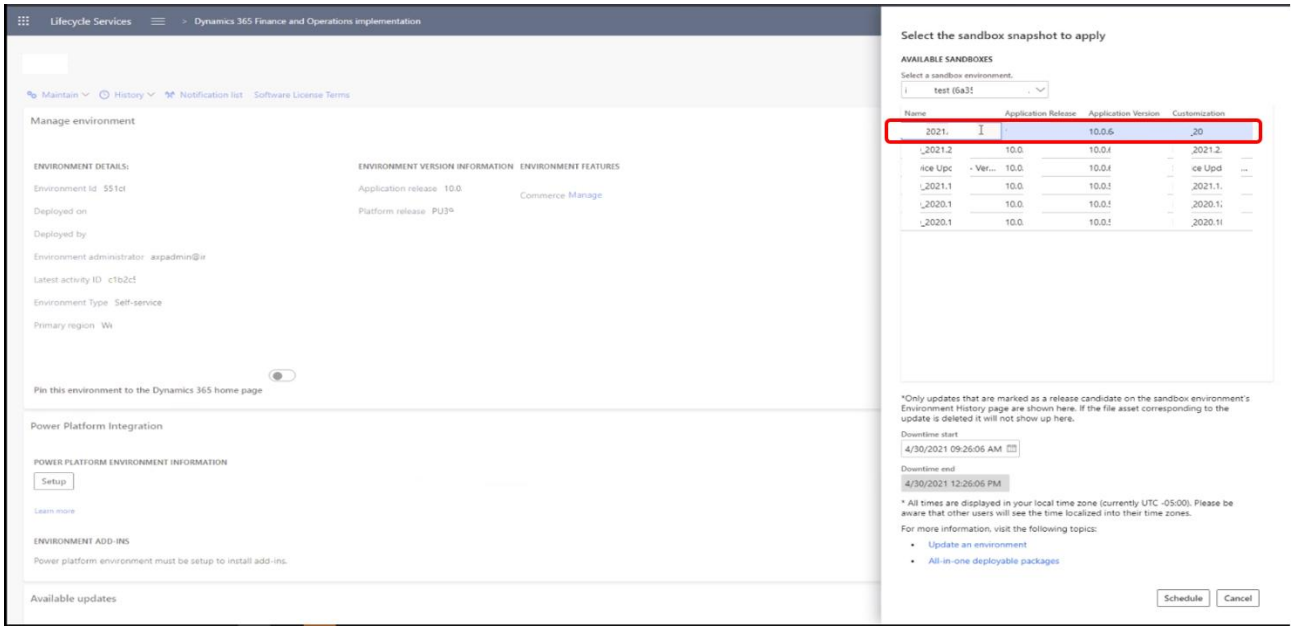
6. Click Maintain > Update environment.



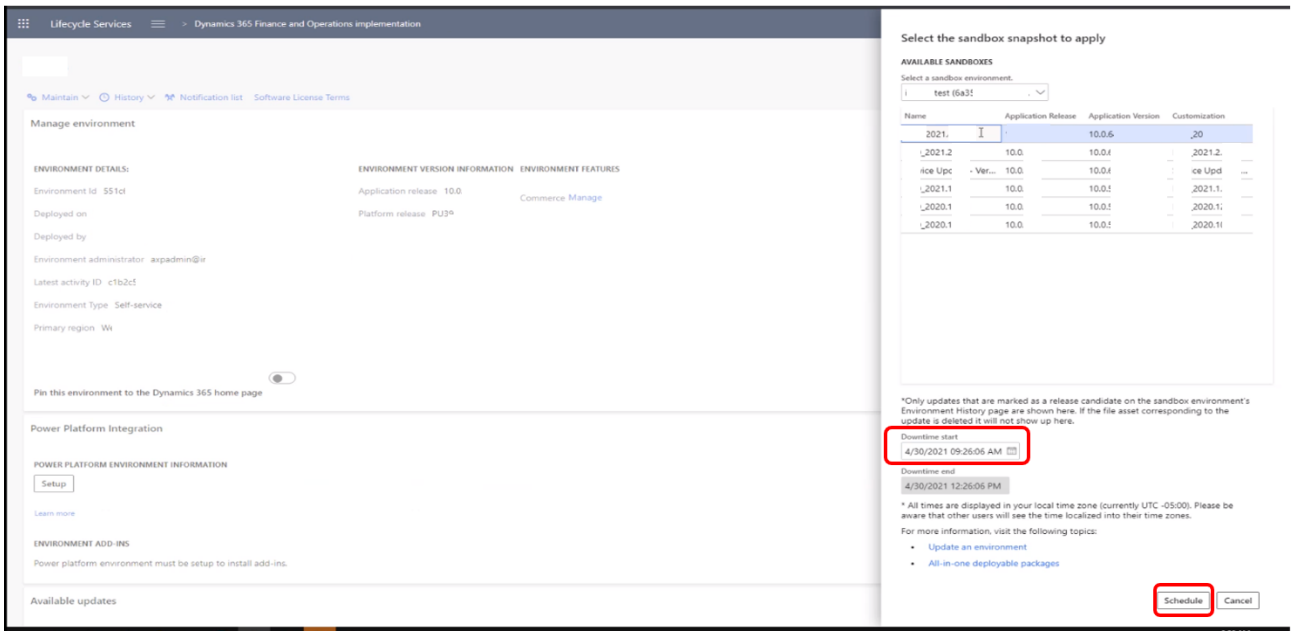
7. Select the sandbox environment from the dropdown menu.



8. Select the deployable package.



9. Select a specific downtime start and click Schedule.



5. SETUP GUIDE FOR LABELING INTEGRATION TO ON-PREMISE MACHINE USING FILE DROP METHODOLOGY

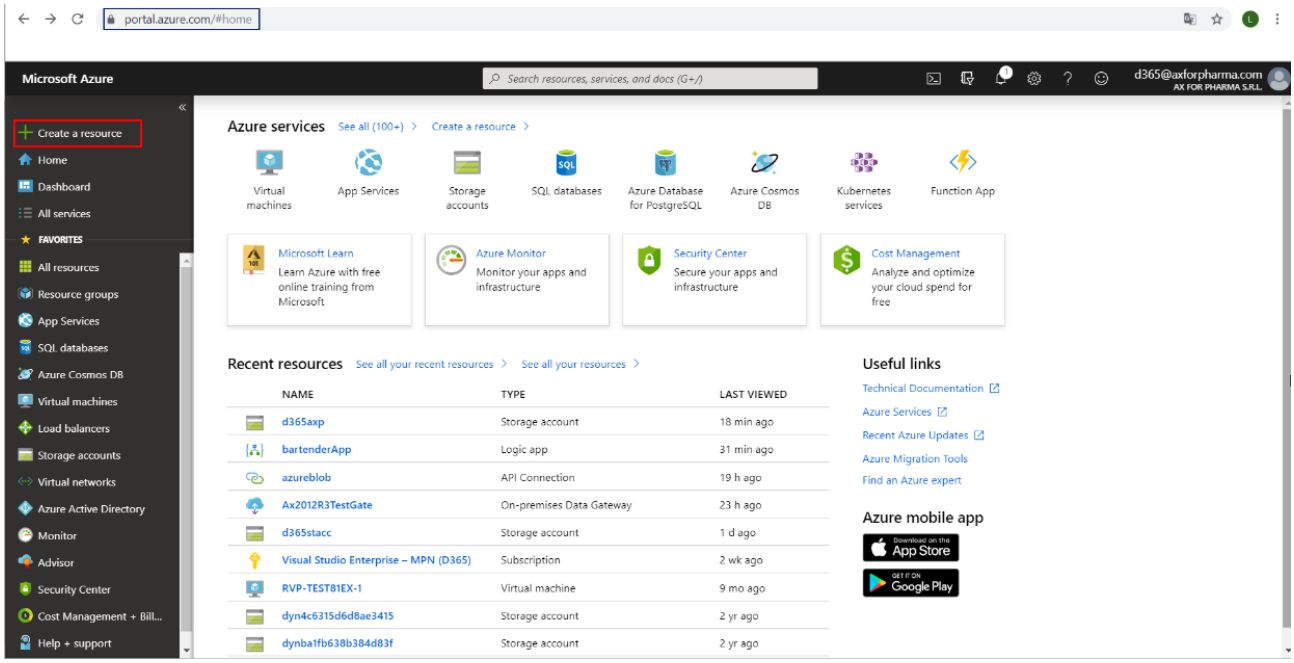
This setup guide applies when choosing to integrate Dynamics 365 and Life Sciences Solution and third party label printing solution using file drop method (i.e. the system generates a label file and drops in a file folder for the third party label printing solution to run print command).

5.1 Create storage account

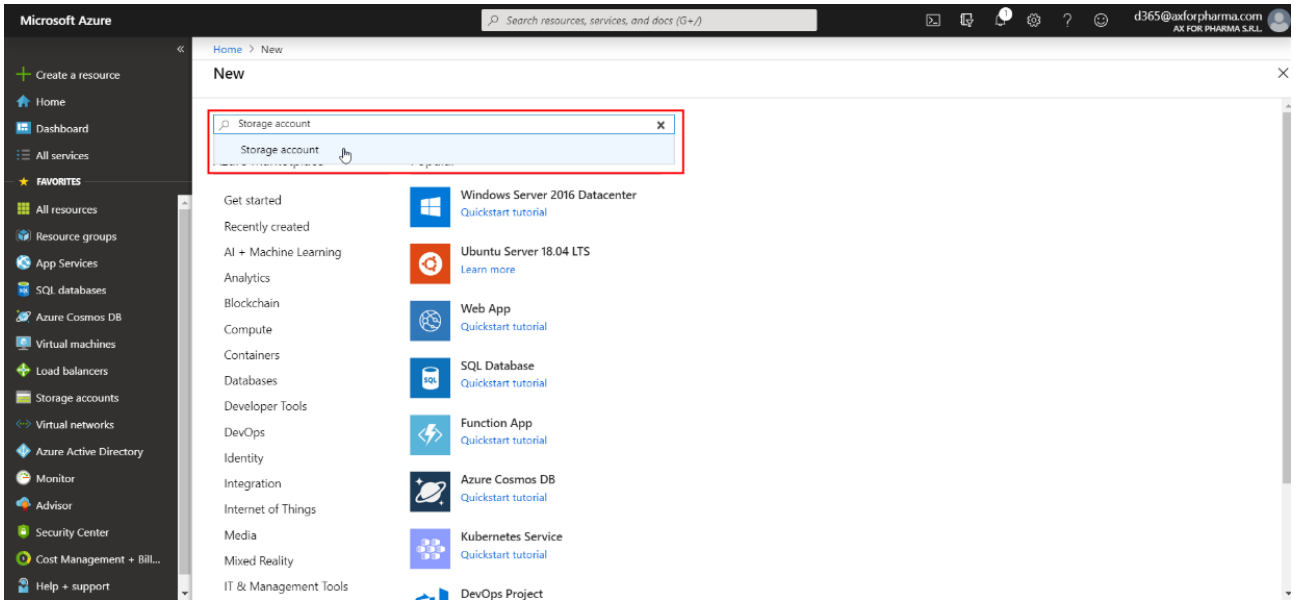
5.1.1 Create storage account

Go to the Microsoft Azure site: https://portal.azure.com/#home.

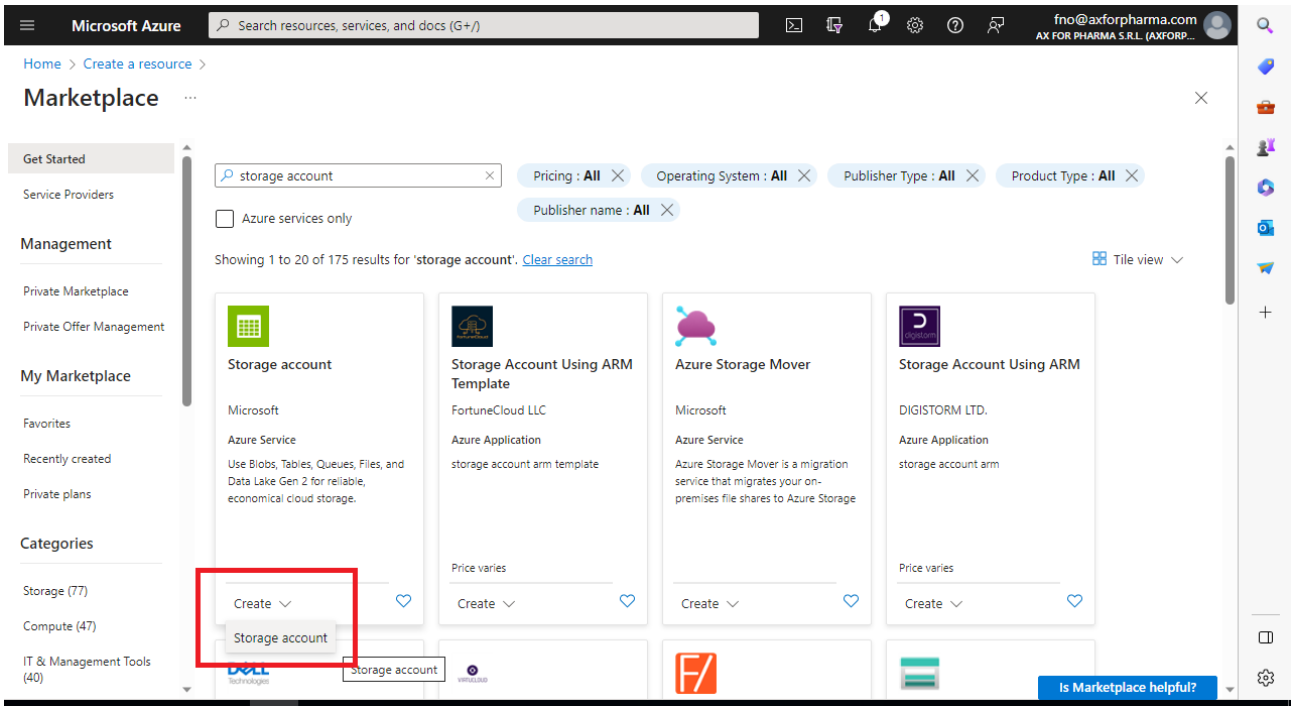
1. Log in and select "Create a resource".



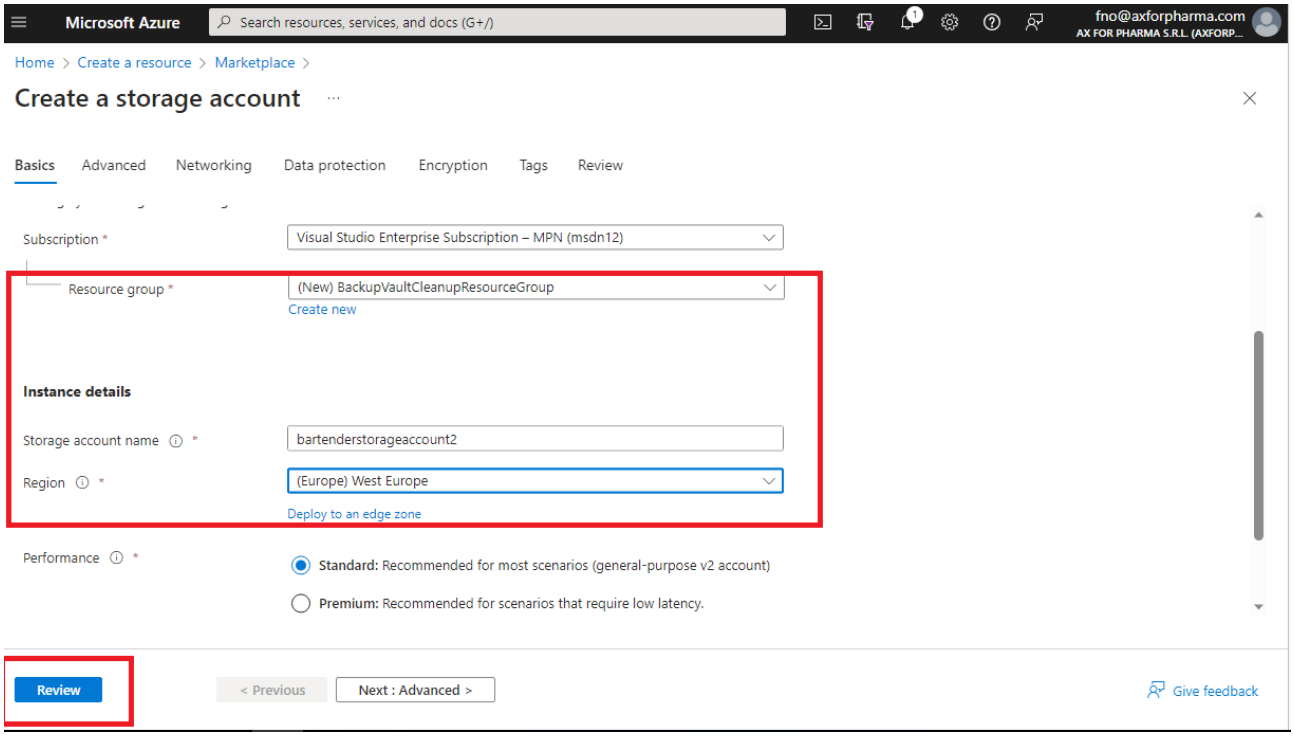
2. Search and select Storage account.



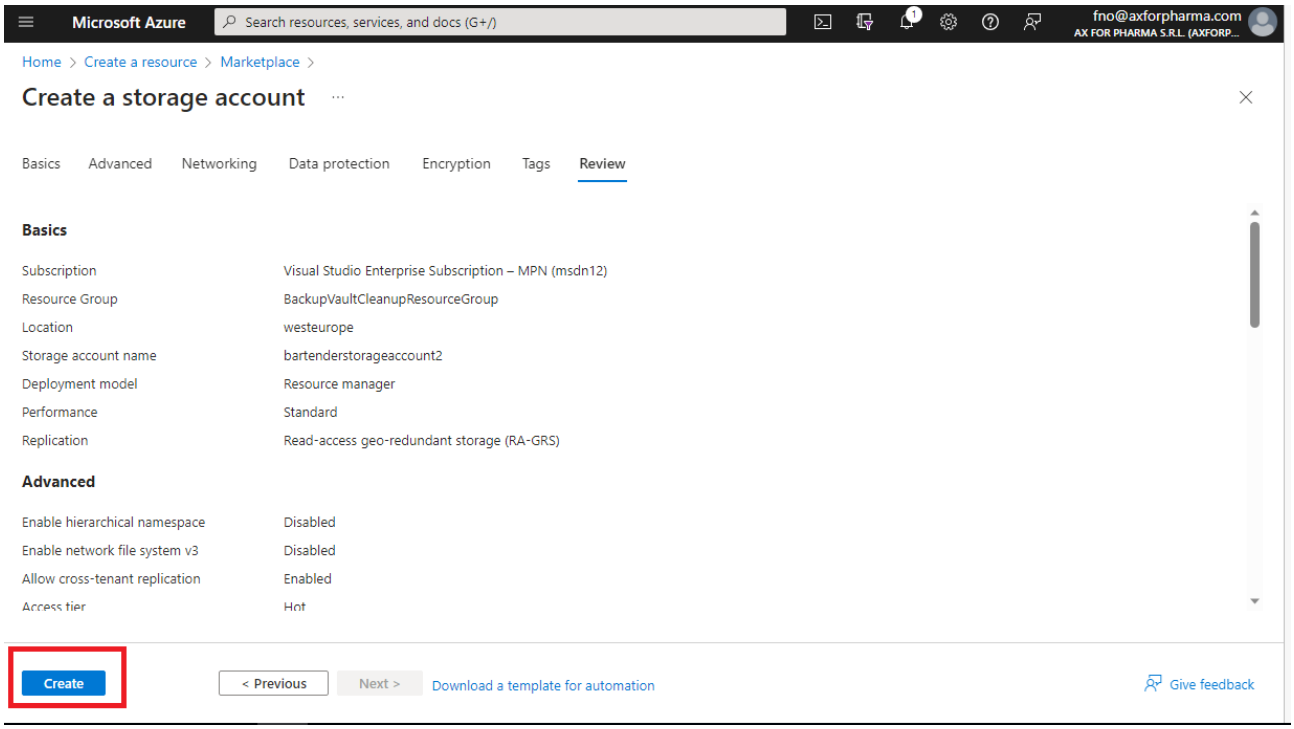
3. Click "Create" > “Storage account” to confirm creation.



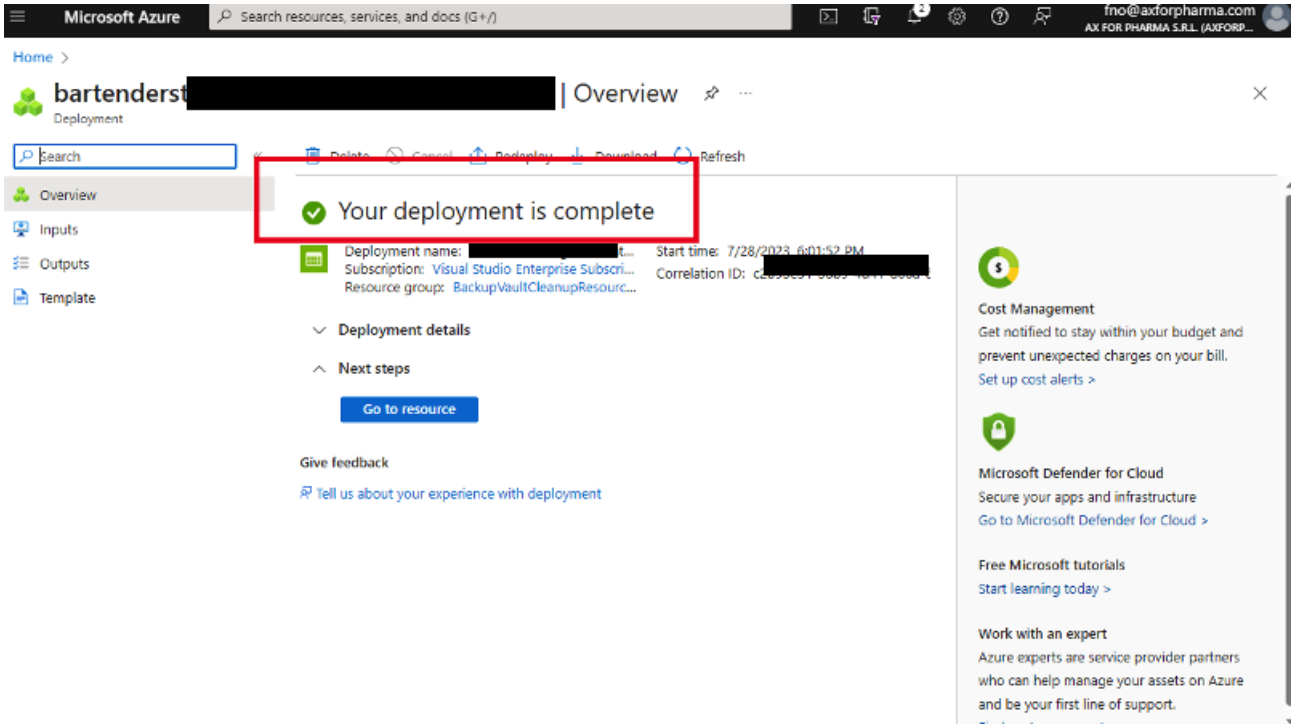
4. In the "Create storage account" page, fill in the following fields:
   a. **Subscription**: verify that the pre-selected value is correct;
   b. **Resource group**: it is possible to either choose an existing one or write a name that the system is assigned to a new resource group created automatically;
   c. **Storage account name**: it must be different from all the other existing storage accounts' names;
   d. **Region**: the region where the account should be created.
   Note: it is recommended to choose the region closest to the on-premises machine and to maintain the same choice for the next steps of this process.
   e. **Performance**: Determine whether you want to have premium performance for block blobs, file shares, or page blobs in your storage account.
   f. **Redundancy**: Choose a replication strategy that matches your durability requirements. Some settings can't be changed after the storage account is created.
5. Then click "Review".



6. Click "Create" to confirm creation.



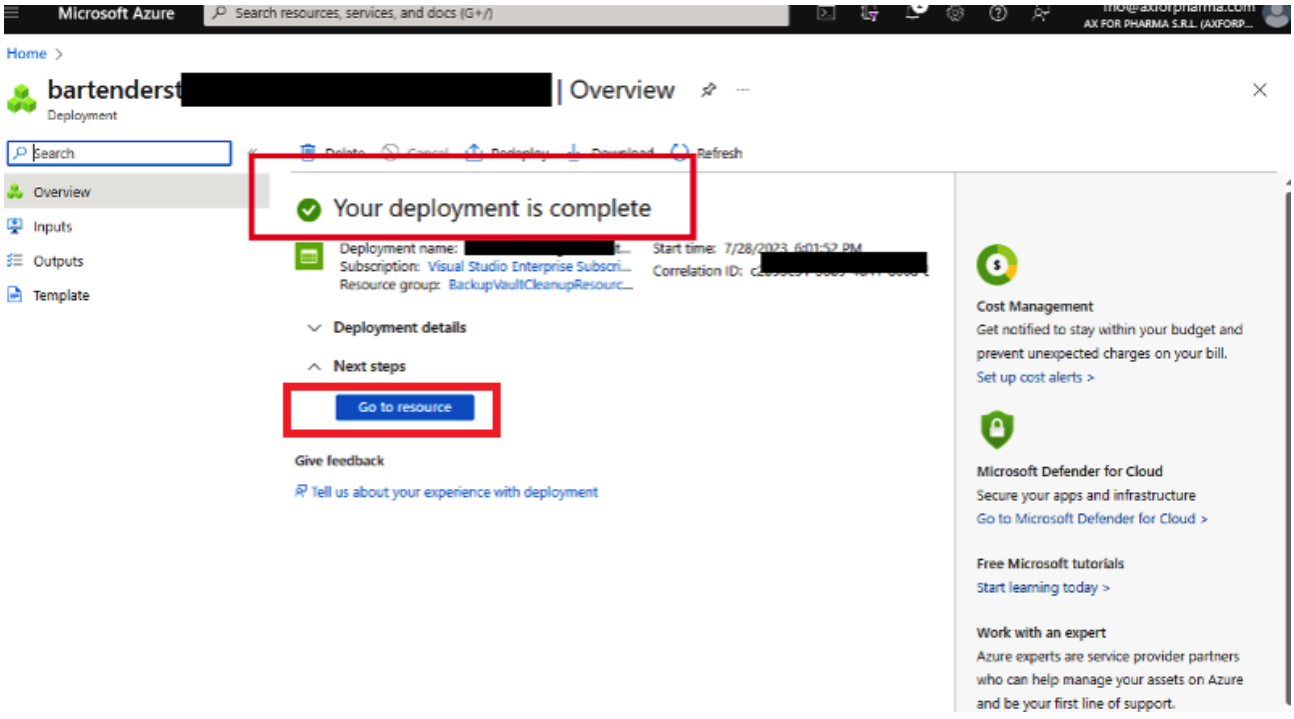
7. Wait until deployment is completed.



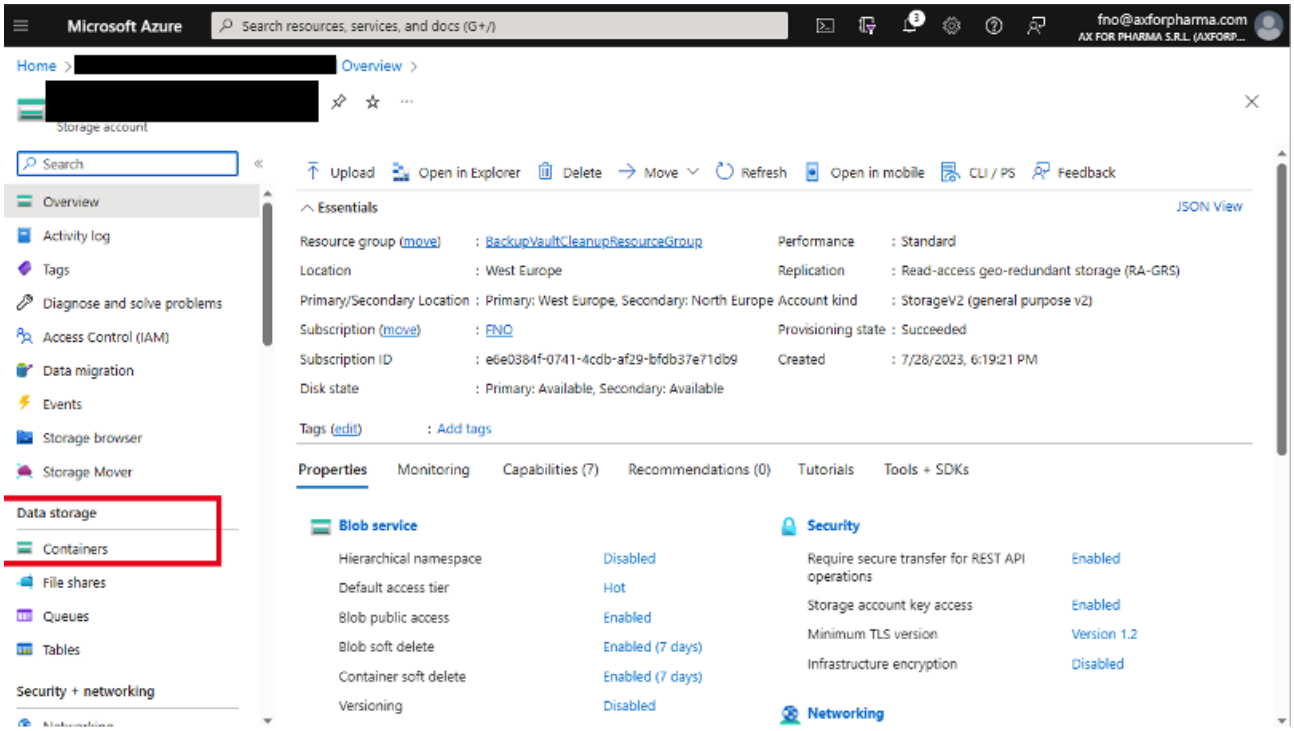
NOTE: For each instance of the label printing software, it is necessary to configure one Azure storage.
It is possible to associate multiple environments to the same Azure storage.

5.1.2 Create container

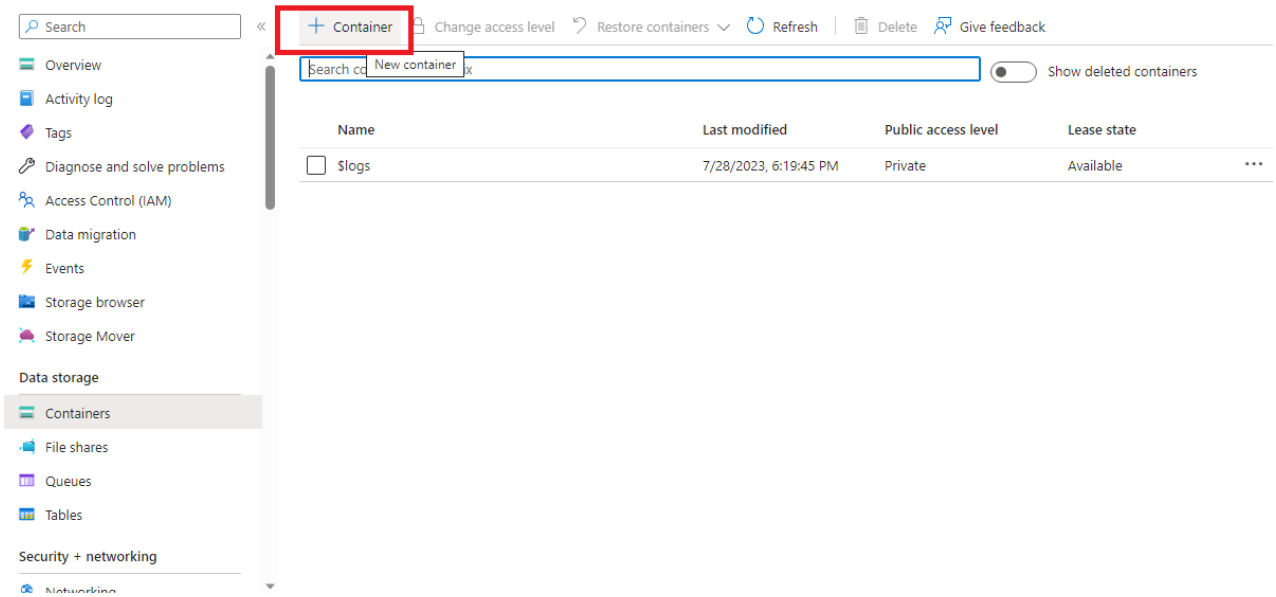
1. Click "Go to resource".



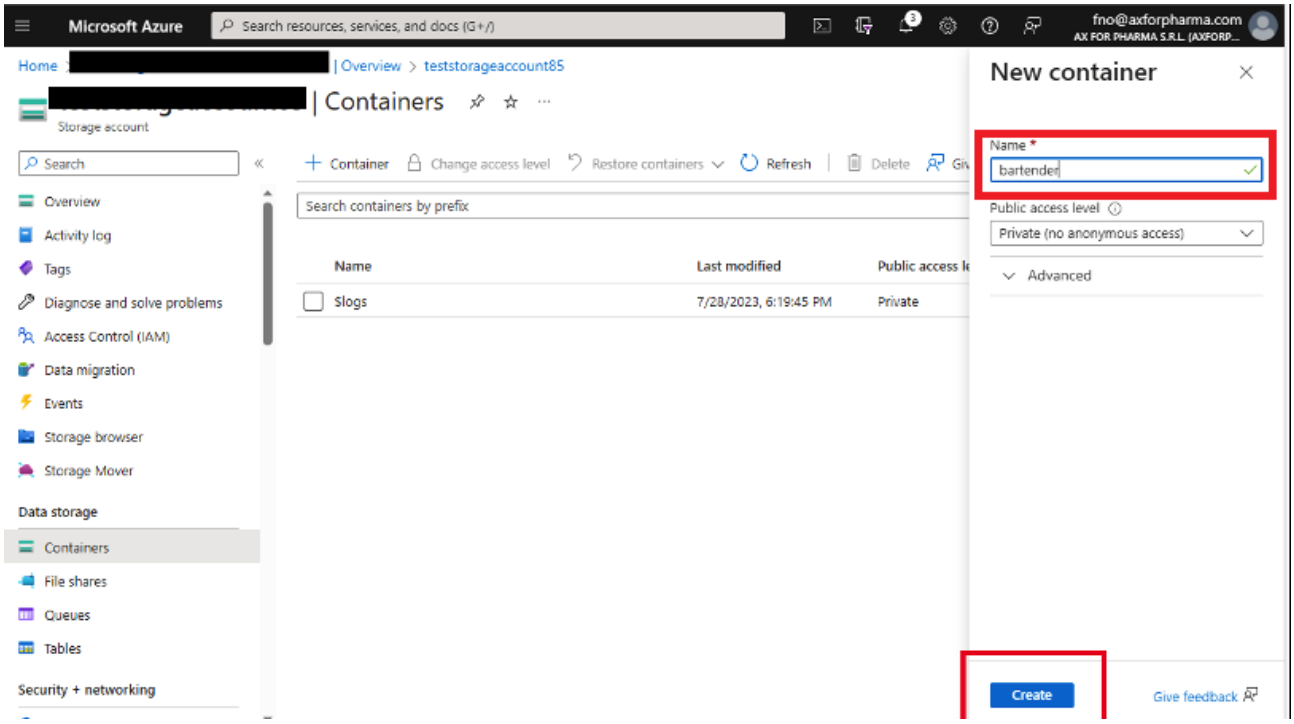
2. Under "Data storage", click "Containers".



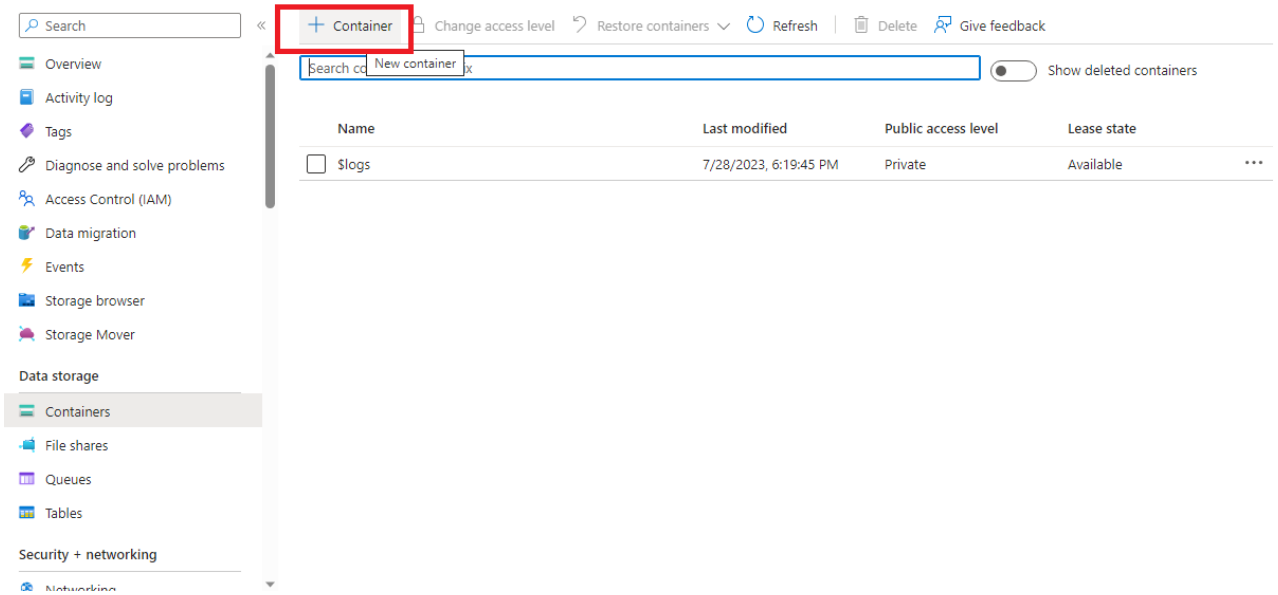
3. Click "+ Container".



4. Enter the name for the container in the Name field and confirm by clicking "Create". This is the repository in Azure that includes all the files exported from Dynamics 365 that have not yet been exported to the on-premises folder.

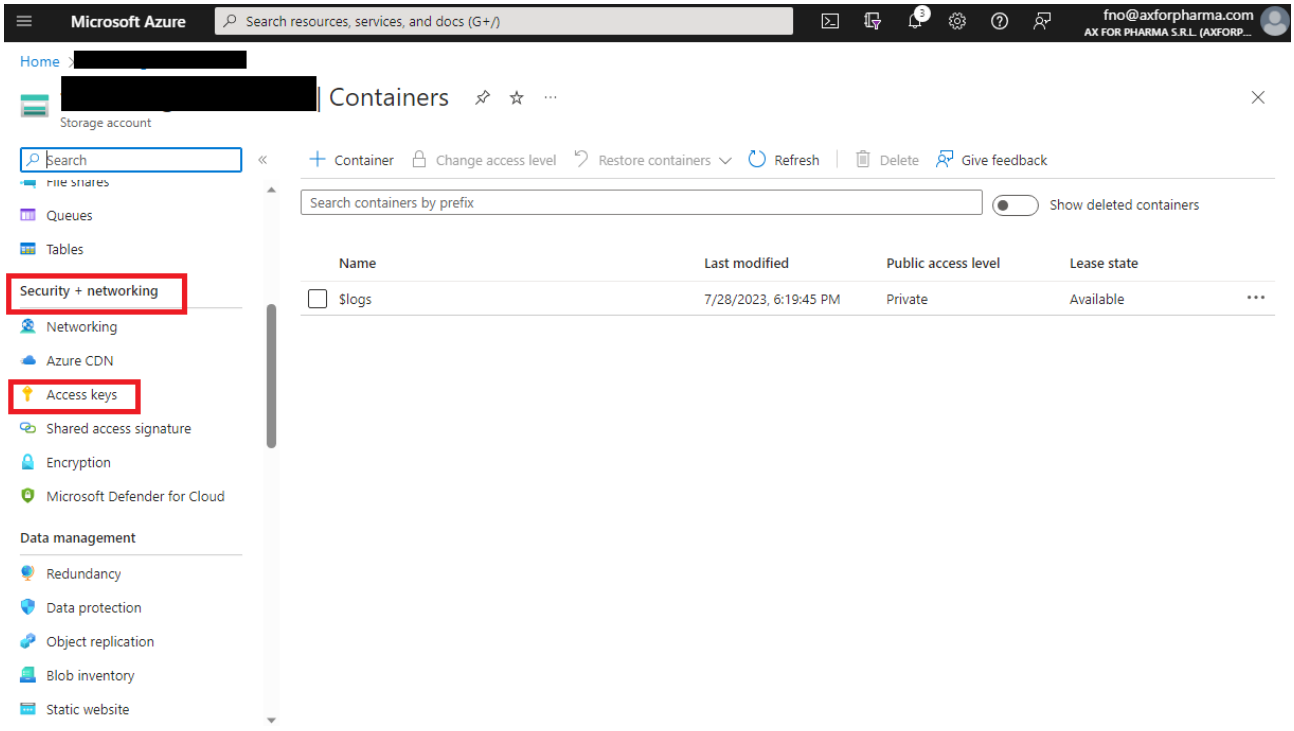


5. Repeat the previous steps (3-4) to create a second container. This is the repository of files successfully transferred to the on-premises folder.

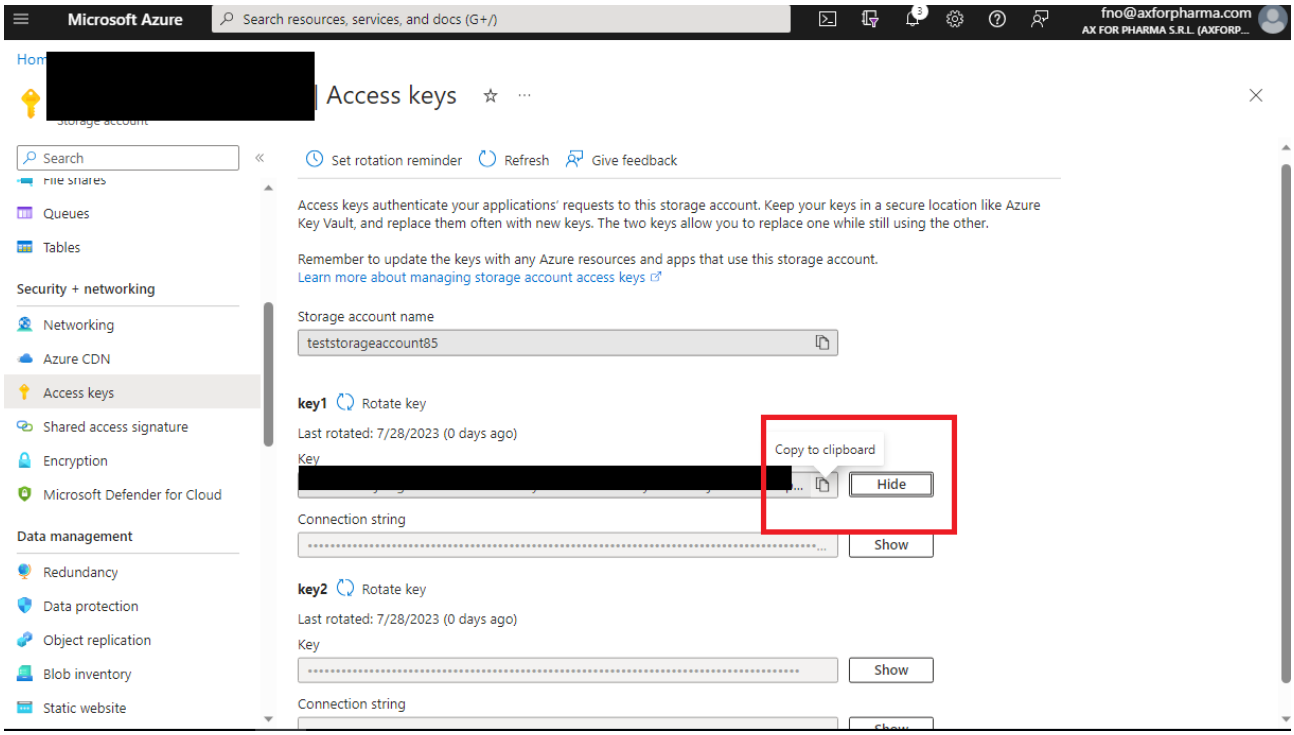


5.1.3 Retrieve Access Keys to the storage account

1. In the list of containers page, click on "Security + Networking"> "Access keys".



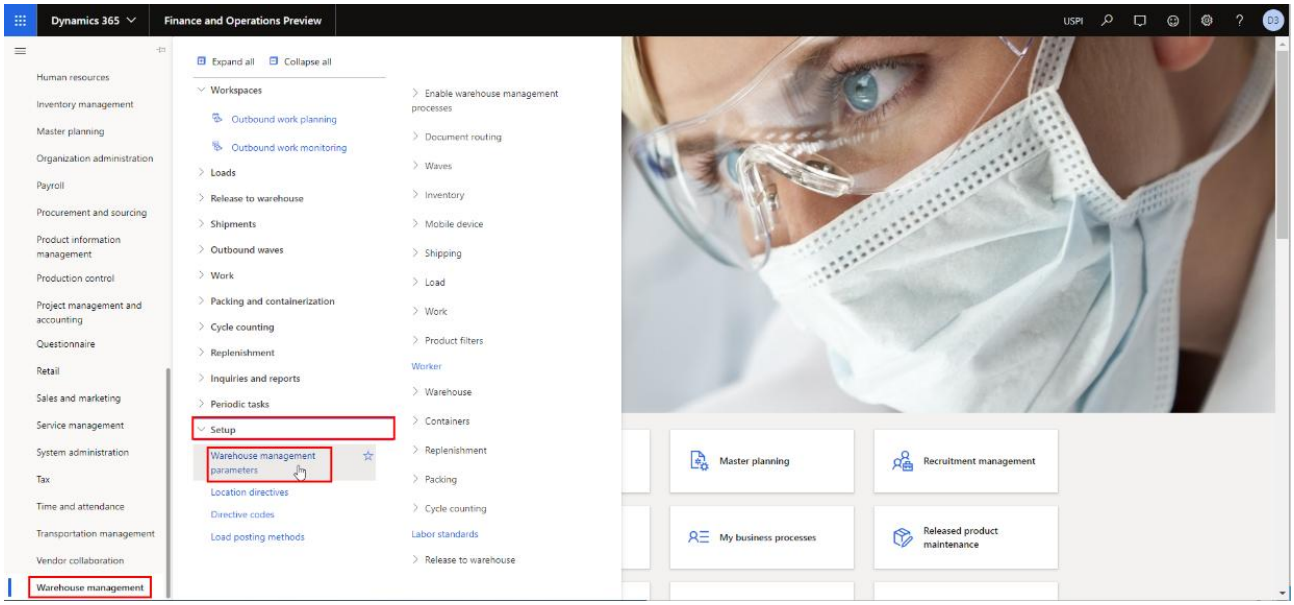
2. Copy one of the two keys and save it in a notepad to be used later. Click “Show” and “Copy to clipboard”.



5.2 Setup in Dynamics 365

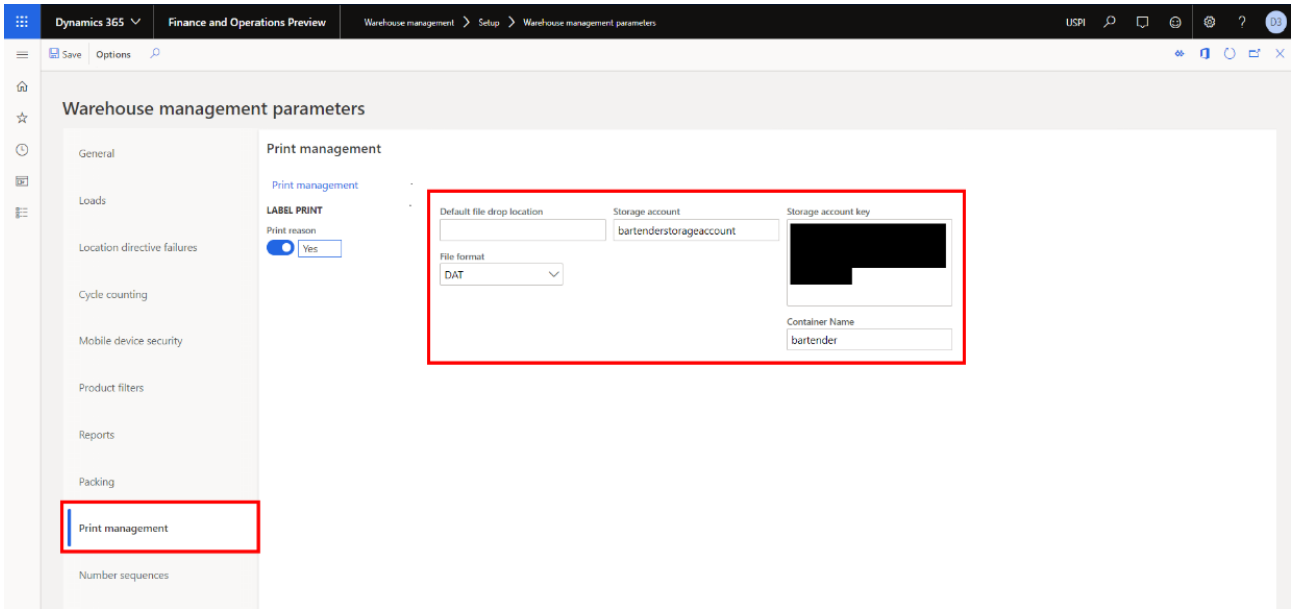
Sign in Dynamics 365 client.

1. Go to **Warehouse management > Setup > Warehouse management parameters**.



2. In the "Print Management" tab, fill in the following fields:

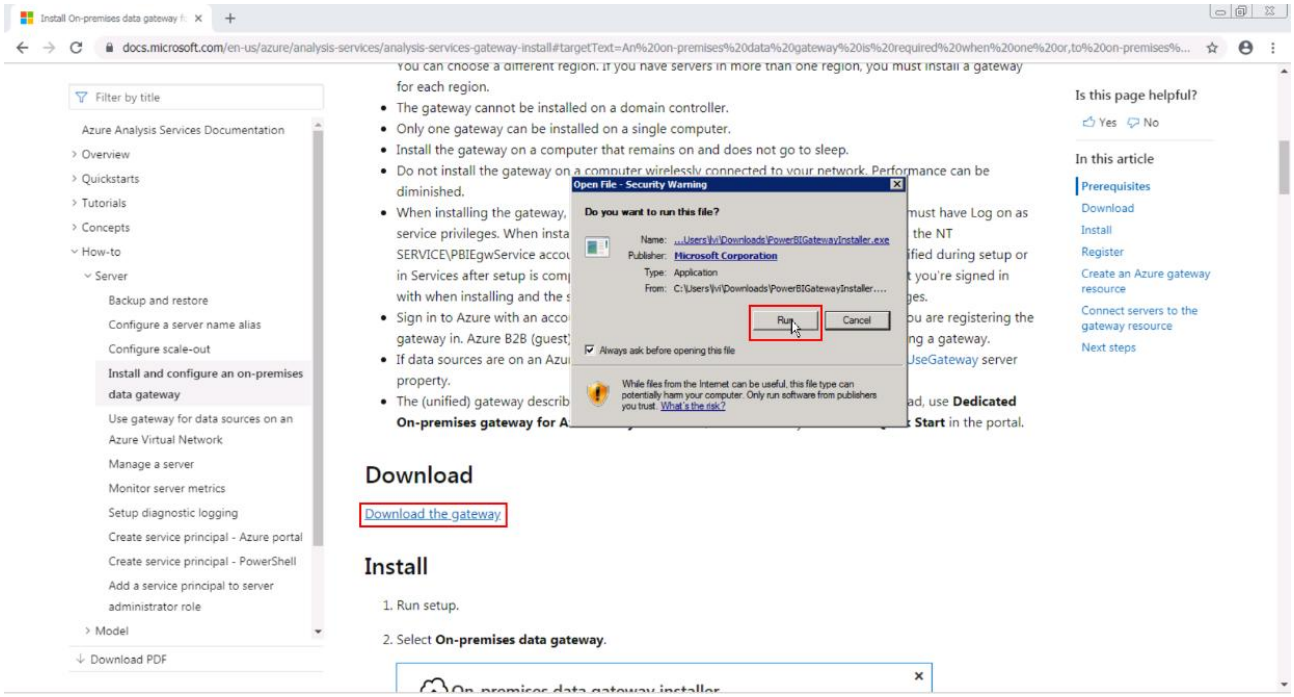
   a. **Storage account**: must be the same as the **Storage account name** created in chapter 5.1.1 (nr. 4);
   b. **Storage account key**: copied from the last step in chapter 5.1.3 (nr. 2);
   c. **Container name**: must be the same as the first container created in chapter 5.1.2 (nr. 4).



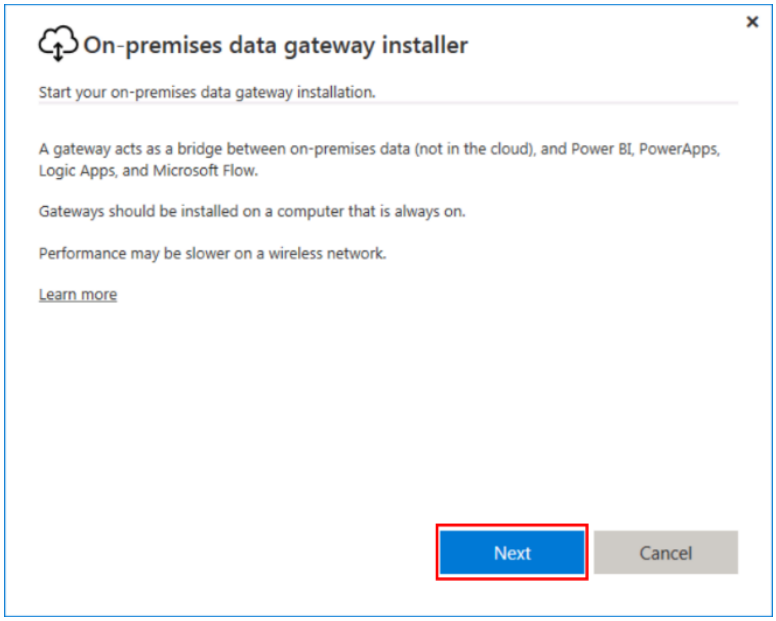
5.3 Create and link on-premises gateway and Azure gateway

5.3.1 Install On-premises data gateway tool

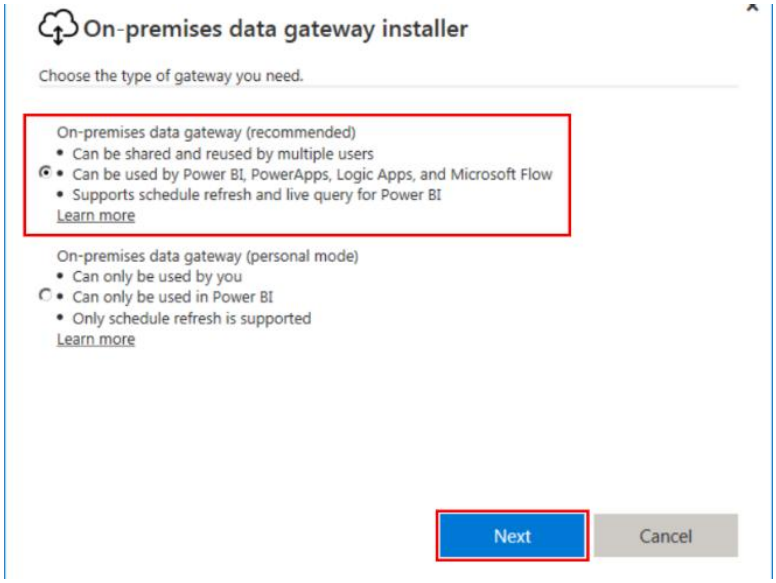
1. Go to: https://docs.microsoft.com/en-us/azure/analysis-services/analysis-services-gateway-install
2. From the On-premises machine, download the On-premises data gateway by clicking "Download the gateway" from the webpage on Microsoft and "run" the downloaded file.



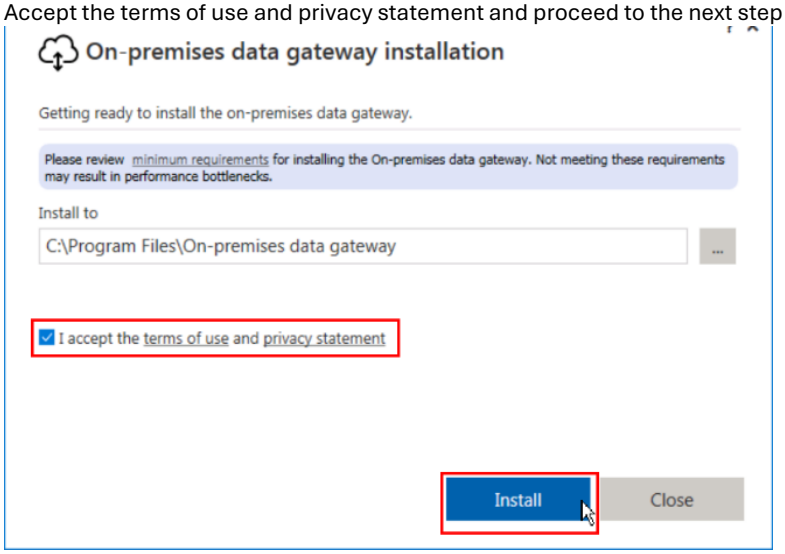
3. Read the instructions carefully and proceed to the next step by clicking "Next".



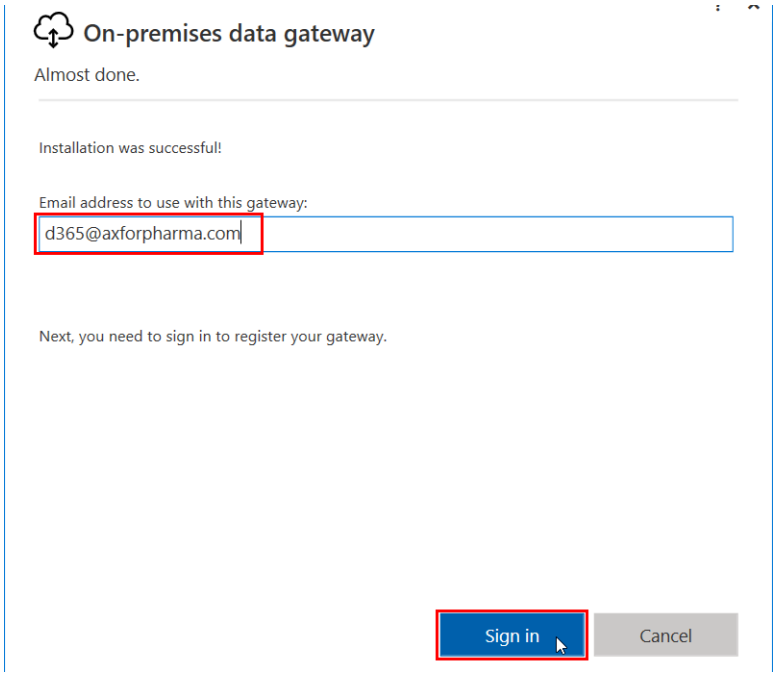
4. Select the recommended installation type and click "Next" to proceed.



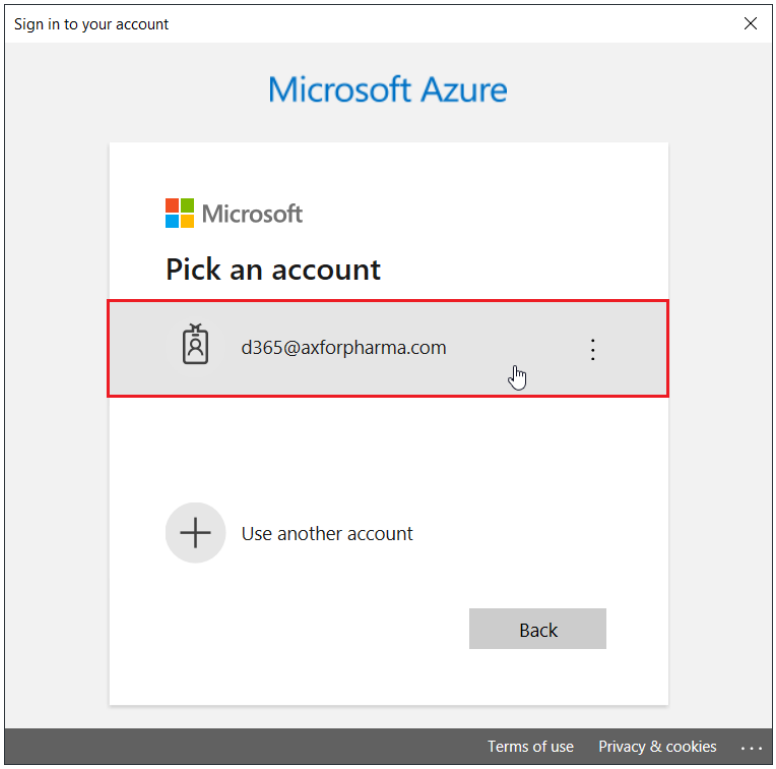
5. Accept the terms of use and privacy statement and proceed to the next step by clicking "Install".



6. Enter the email address linked to the Azure account (i.e. used to set up the storage account in chapter 5.1.1) and click "Sign in".

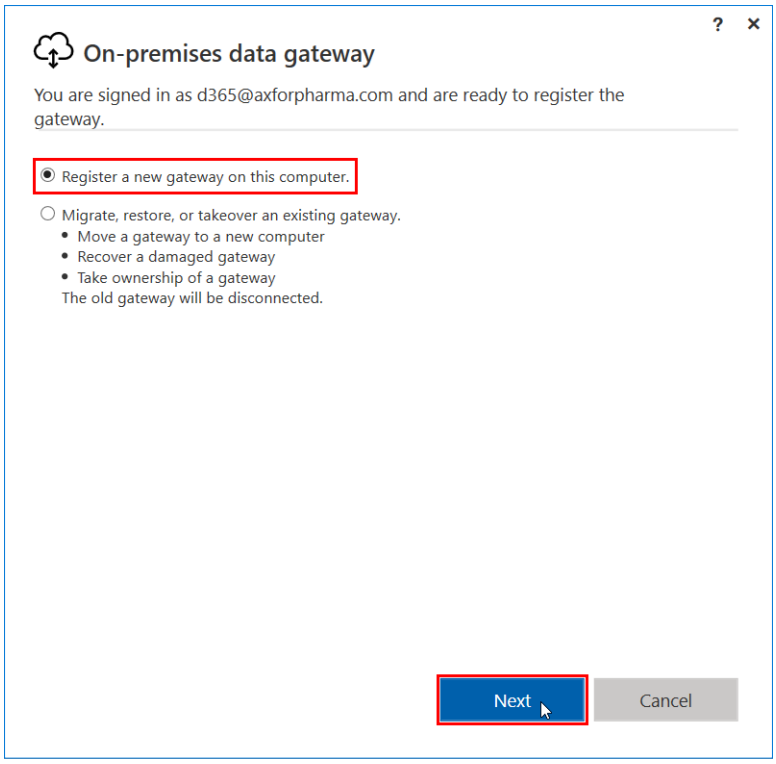


7. Log into the Azure account and click the email address to proceed to the next step.

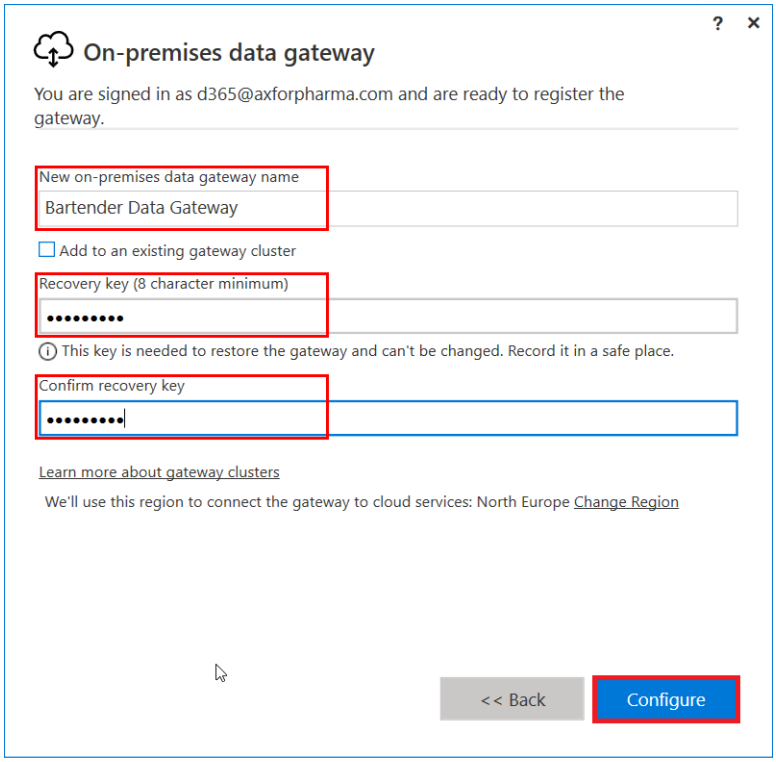


5.3.2 Create on-premises gateway

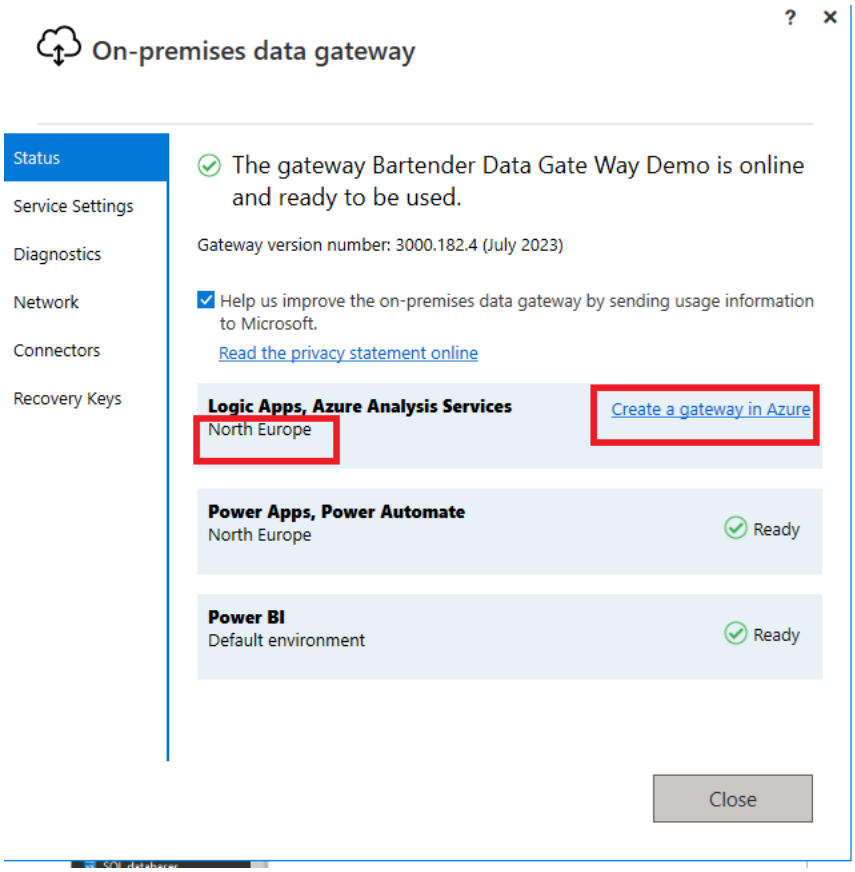
1. Select "Register a new gateway on this computer" and click "Next".



2. Enter a gateway name and a Recovery key and click "Configure".

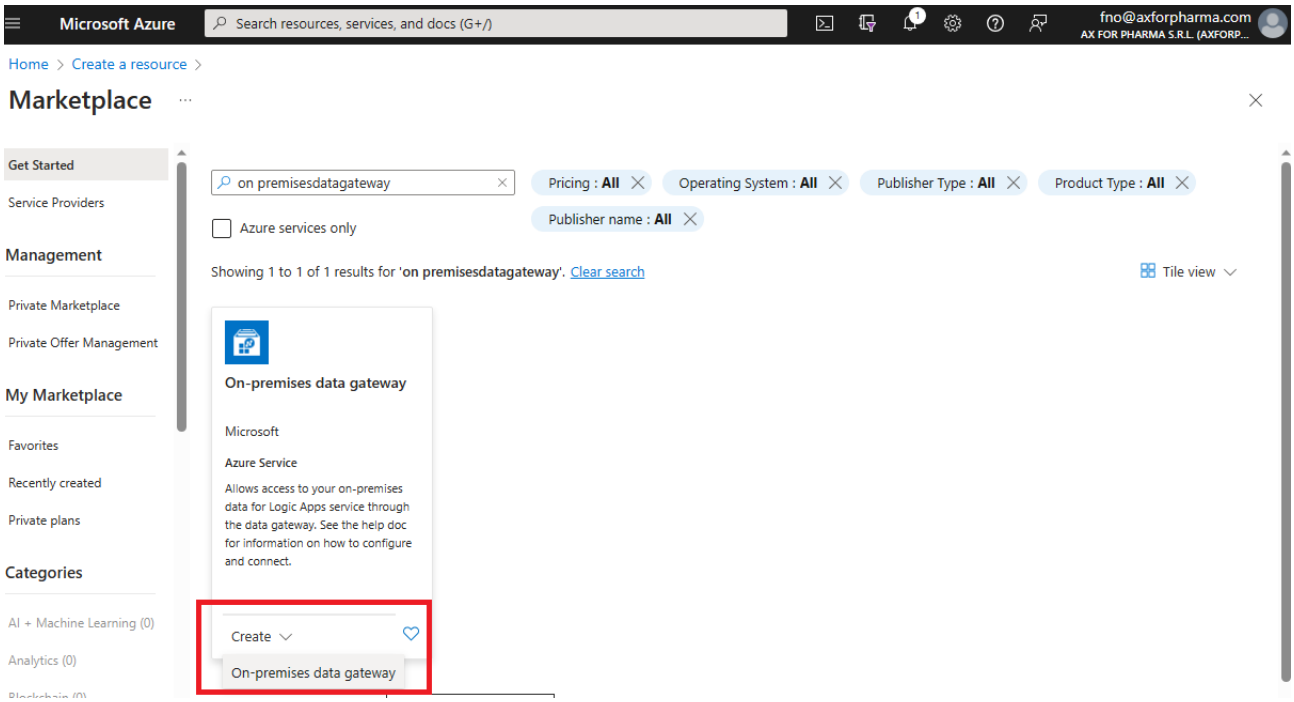


3. Take note of the gateway location and click "Create a gateway in Azure" to create the Azure gateway linked to the on-premises gateway.



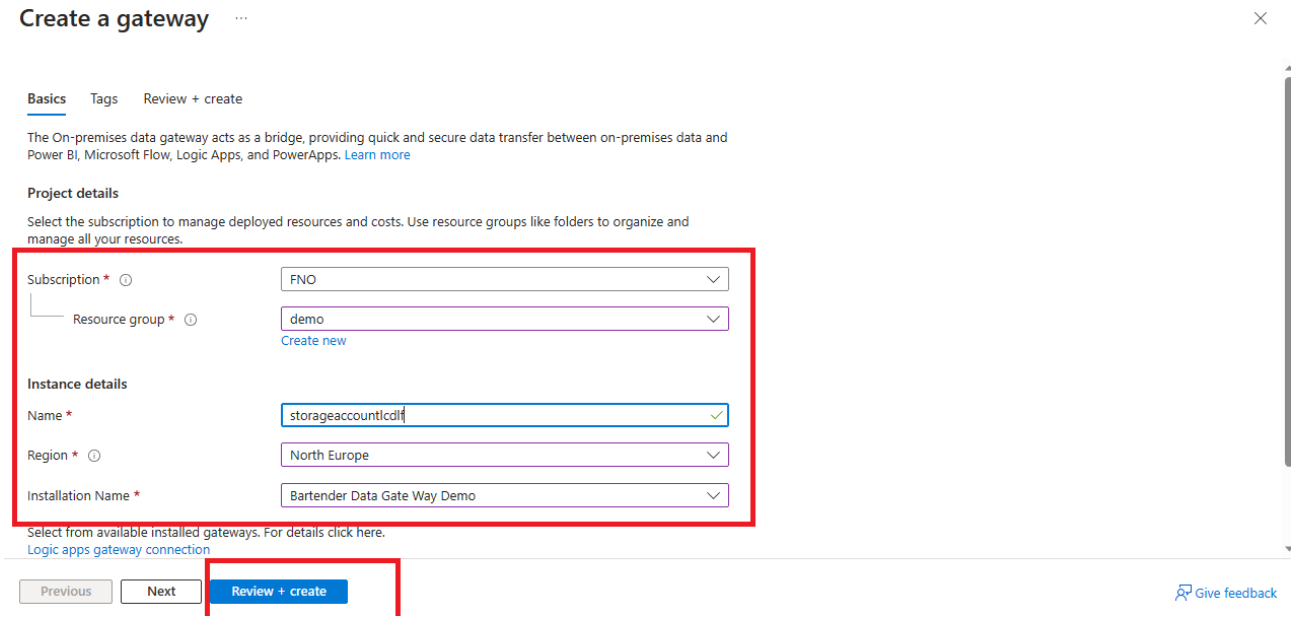
5.3.3 Create Azure gateway

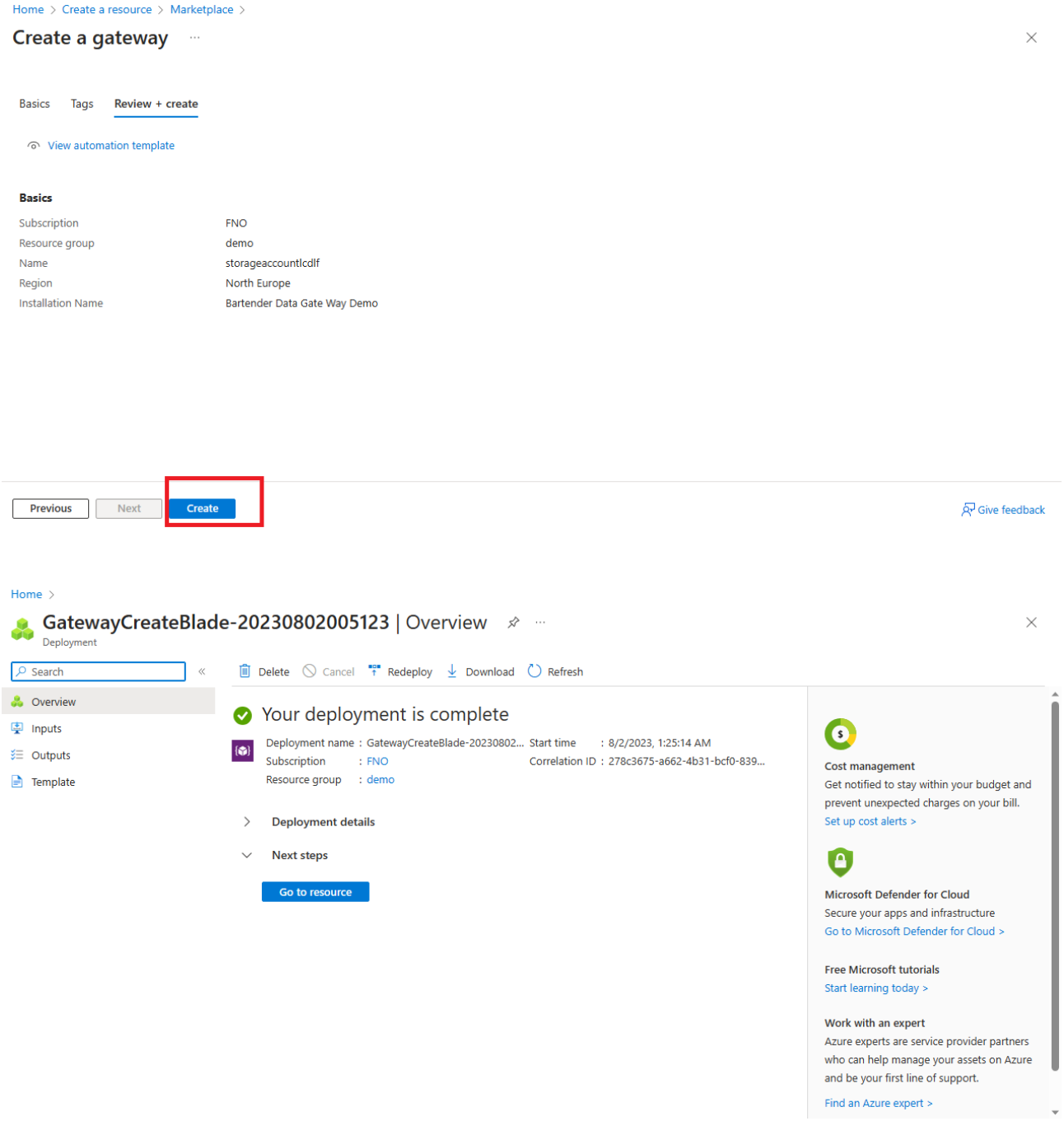
1. In Azure portal, click Create a resource, then search for On-premises data gateway, and then click “Create” > “On-premises data gateway”.



2. In Create connection gateway, enter these settings:
   a. **Subscription:** verify that the pre-selected value is correct;
   b. **Resource group**: must be the same as the one chosen in chapter 5.1.1;
   c. **Name**: must be the same as **Storage account name** selected in chapter 5.1.1;
   d. **Region**: must be the same as the one in the last step of chapter 5.3.2 (nr. 3)
   e. **Installation Name**: select the on-premises gateway created in chapter 5.3.2 from the dropdown menu.

3. When you're done, click **“Review + create”** then **“Create”**.

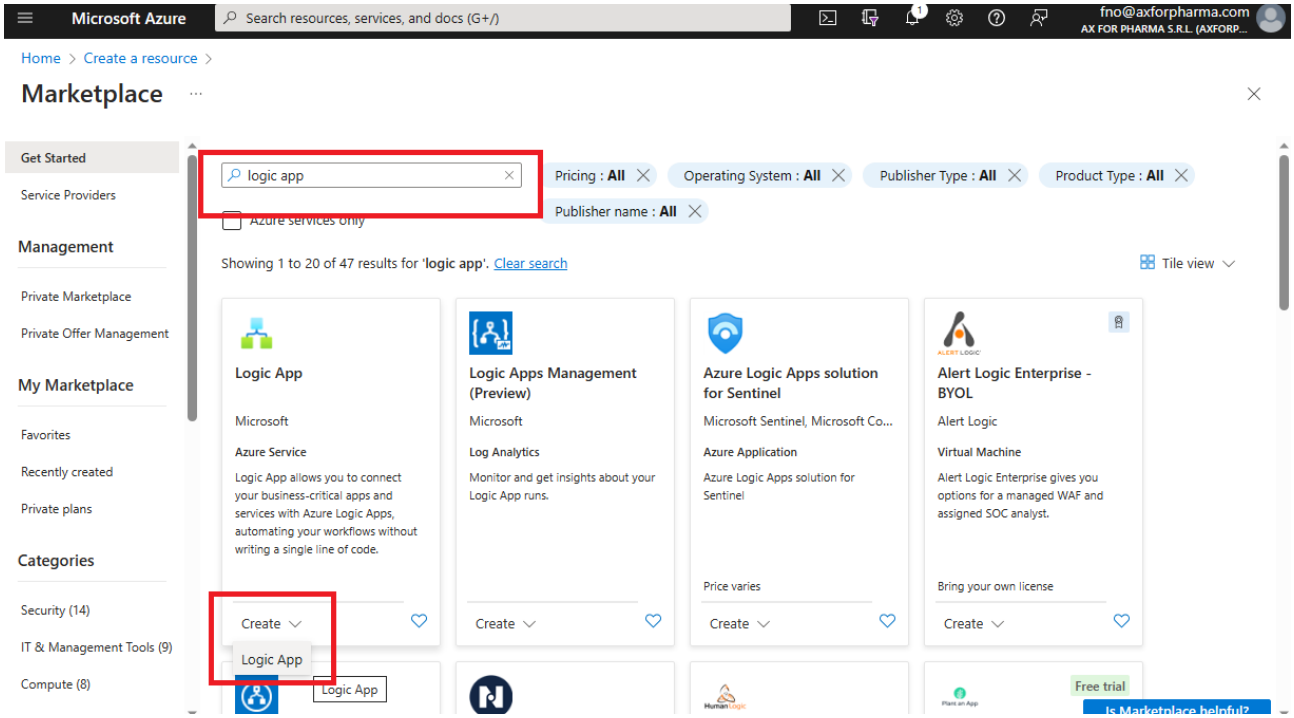




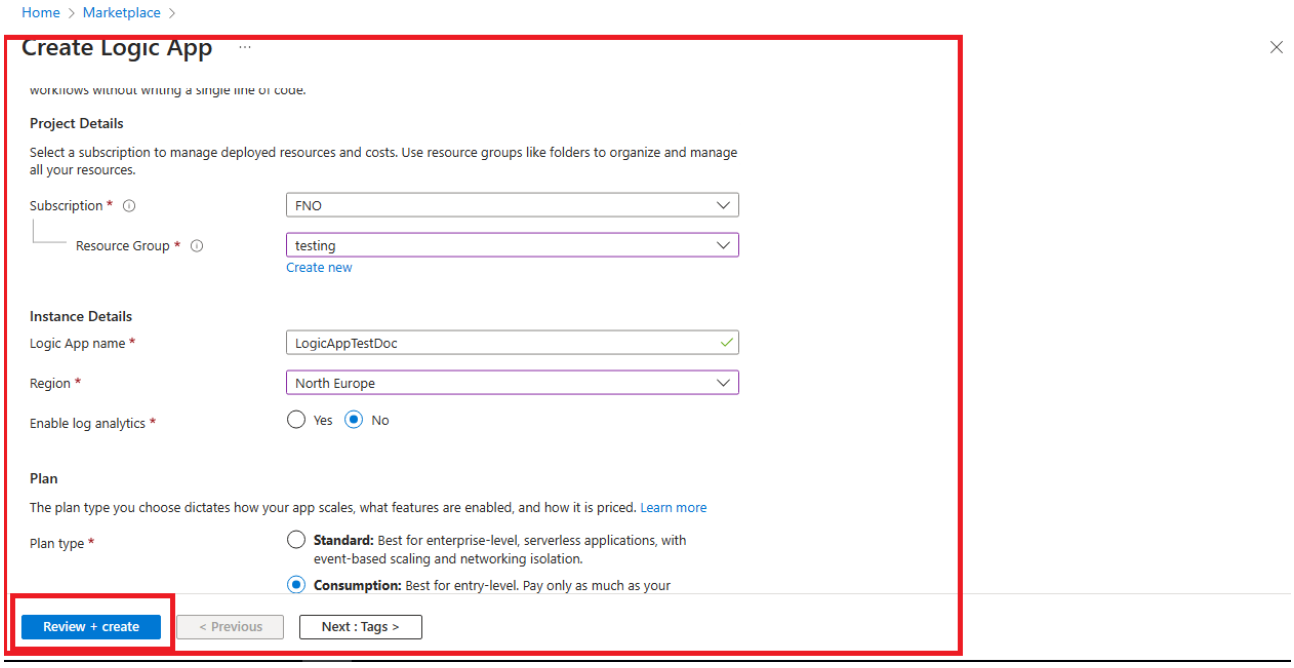
5.4 Configure Logic App

5.4.1 Configure Logic App

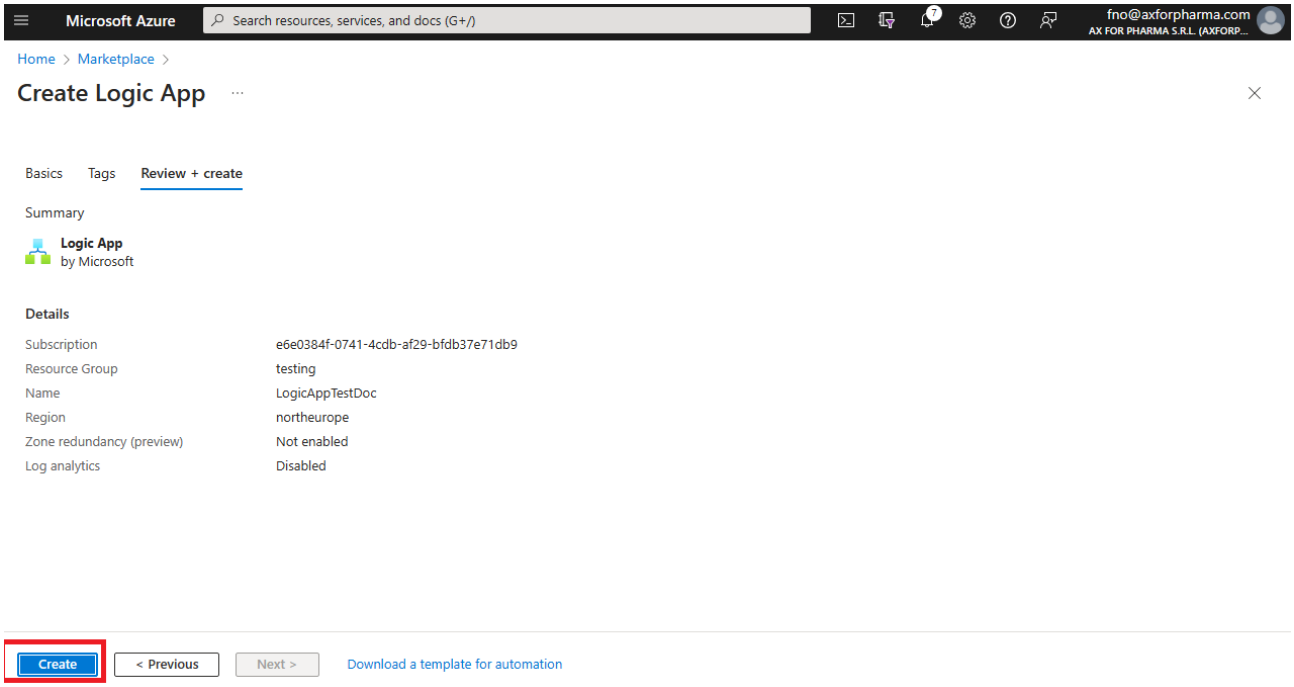
1. Go to the Microsoft Azure site: https://portal.azure.com/#home.
2. Click "Create a resource".
3. Search and click “Create” > “Logic App”.



4. In the Logic App, fill in the following fields:
   a. **Subscription**: verify that the pre-selected value is correct;
   b. **Resource group**: click "Use existing" and select the one created in chapter 5.1.1;
   c. **Logic App Name**: it must be different from the existing Logic Apps' names;
   d. **Region**: it is recommended to choose the region closest to the on-premises pc.
   e. **Enable log analytics**: Pick “No”
   f. **Plan type**: Pick “Consumption” in order to pay only when the logic app is executed.
5. Click "Review + Create".

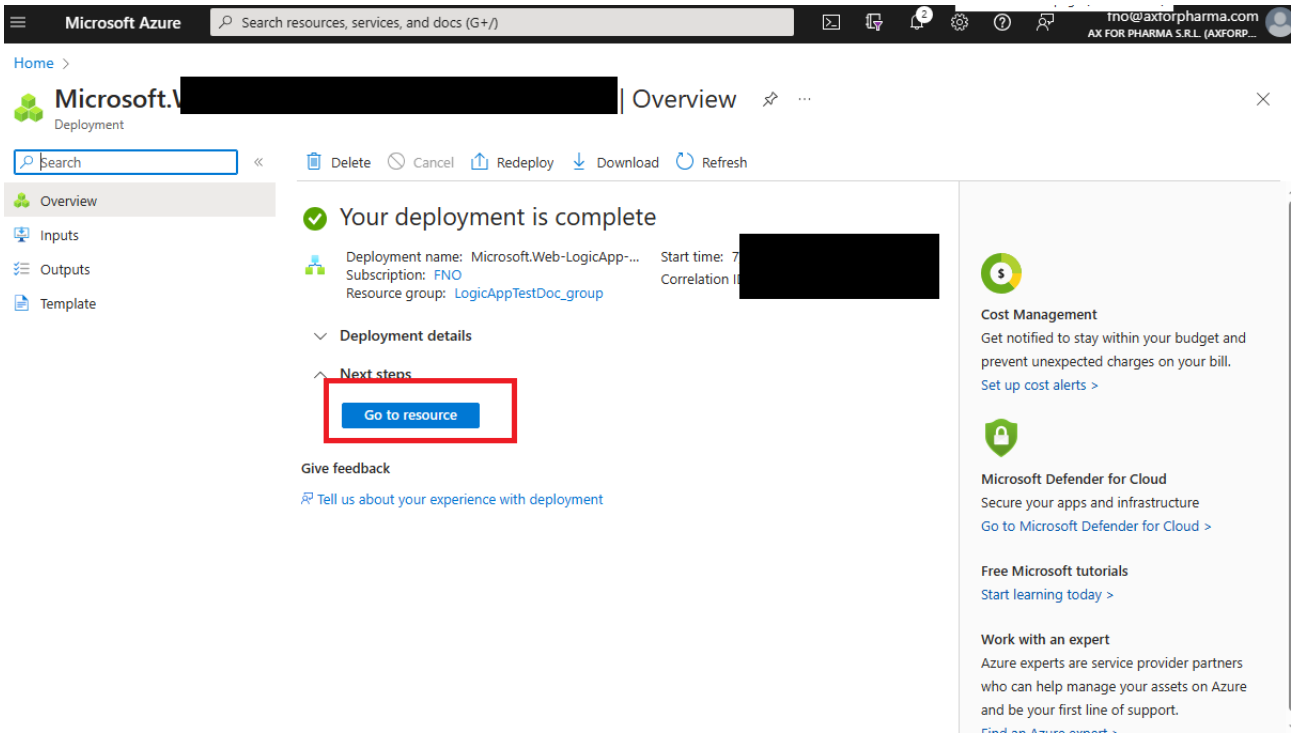


6. Click “Create”.

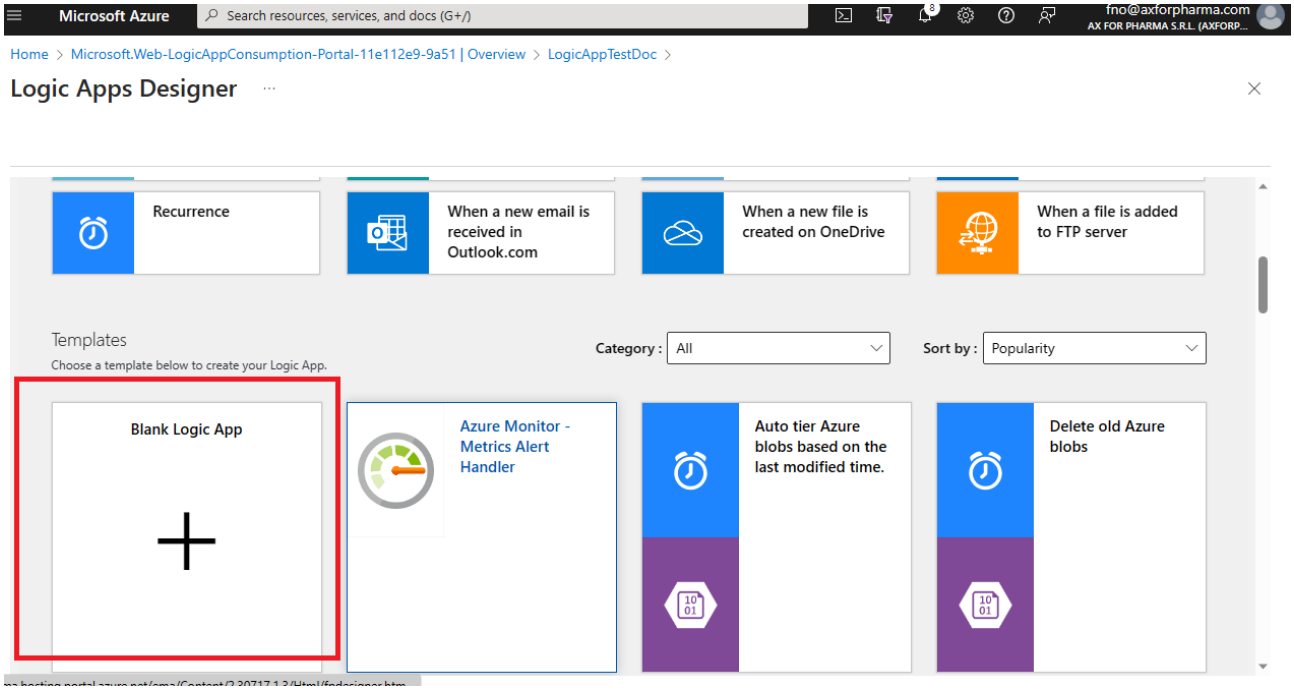


5.4.2 Design workflow

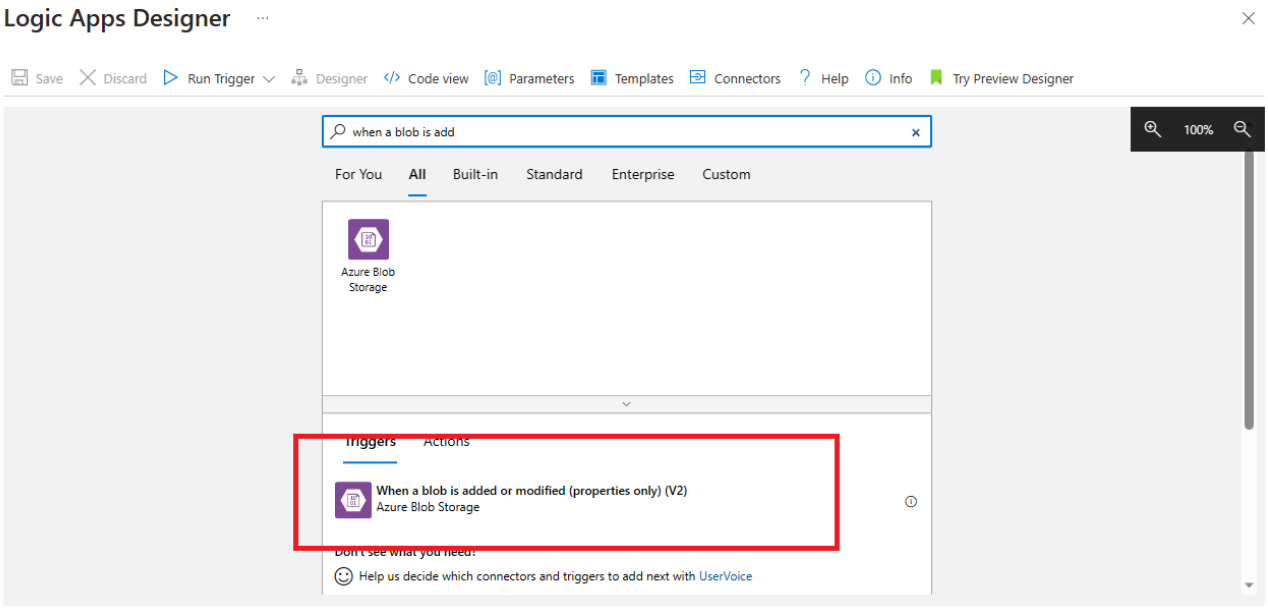
1. In the window (that opens automatically), click "Go to resource" or go to the logic app page created in chapter 5.4.1.



2. Click "Blank Logic App" over "Templates"

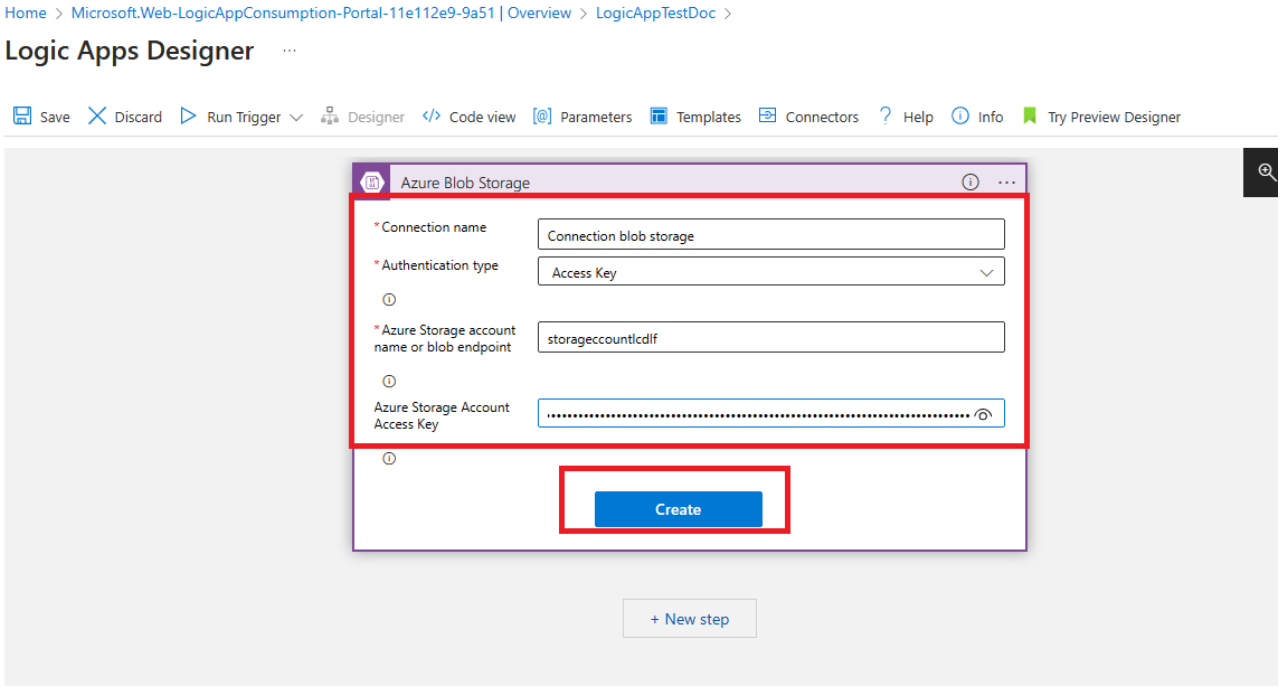


3. Search When a blob is added to select the Trigger of "When a blob is added or modified (properties only) (V2)".

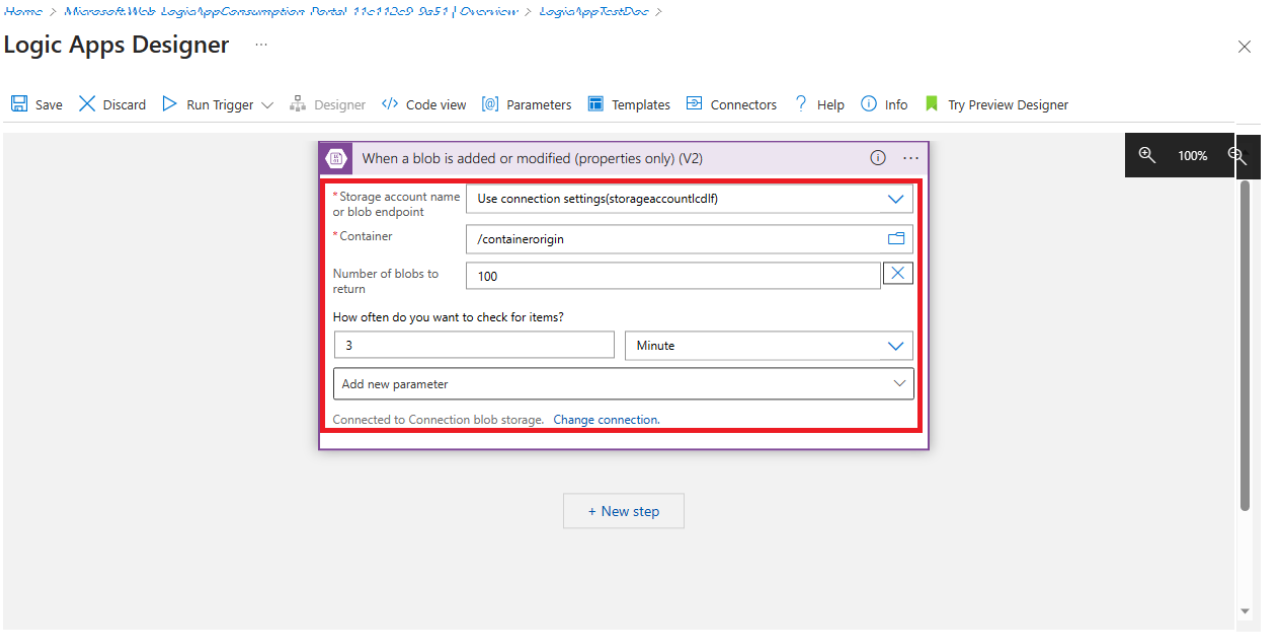


4. Setup the connection:
   a. **Connection name**: Choose a name for the connection
   b. **Authentication Type**: Pick “Access key”
   c. **Azure storage account name or blob endpoint**: Select/Fill the Storage account created in chapter 5.1.1
   d. **Azure Storage Account Access Key**: Use the access key copied in chapter 6.1.3.2

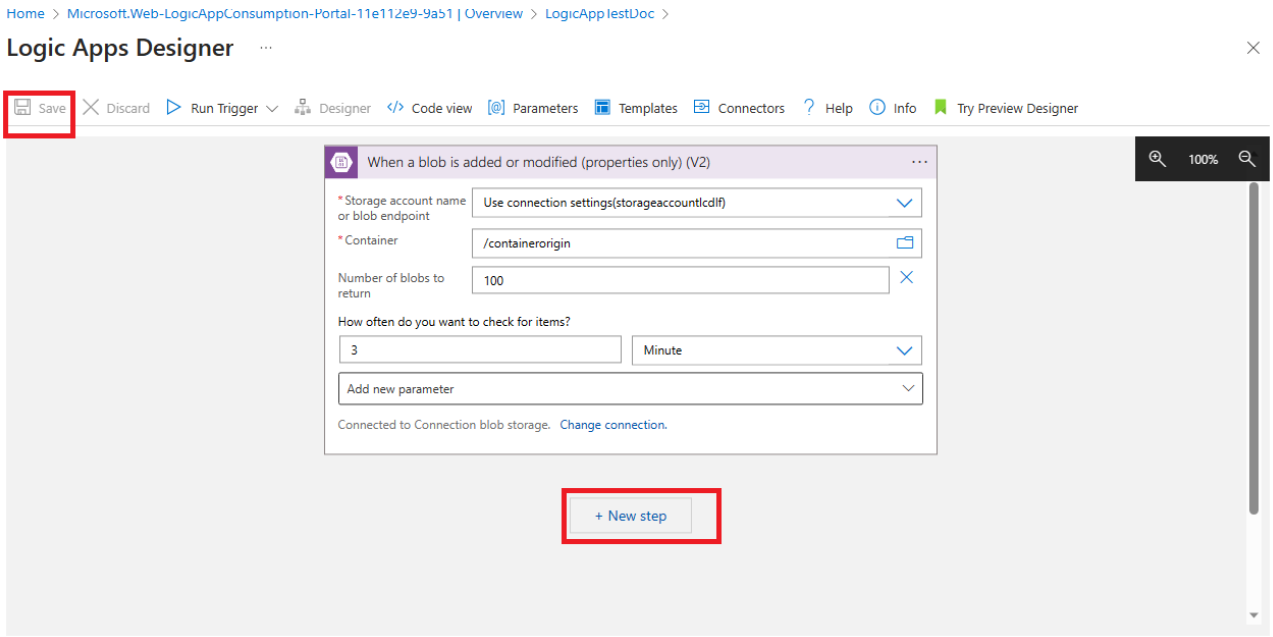
   Click **“Create”**



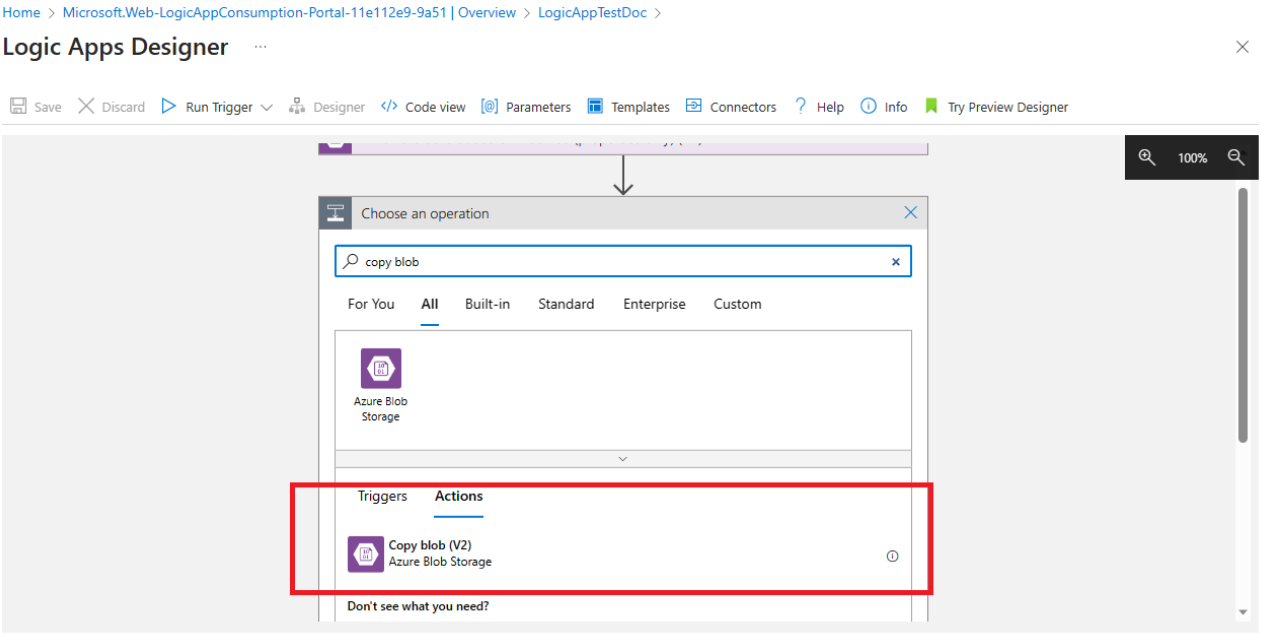
5. Fill the following fields:
   a. **Storage Account Name Or Blob Endpoint**: Select the Storage account created in chapter 5.1.1
   b. **Container**: same name as the first container created in chapter 5.1.2 for files waiting to be transferred to the on-premises machine
   c. **Number of blobs to be return**: the desired maximum number of files to be
   d. **How often do you want to check for items?**: select the desired interval of execution



6. Click “Save” and “New step”



7. Search for Copy blob to select the Action "Copy blob (V2)"



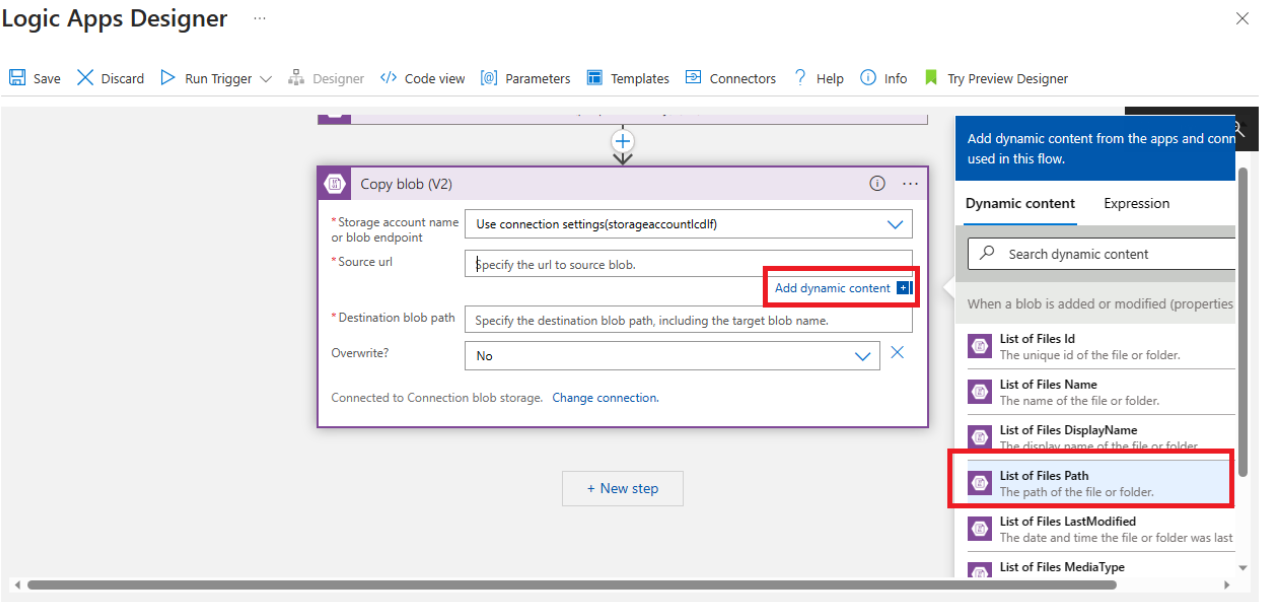
8. Fill the following parameters:

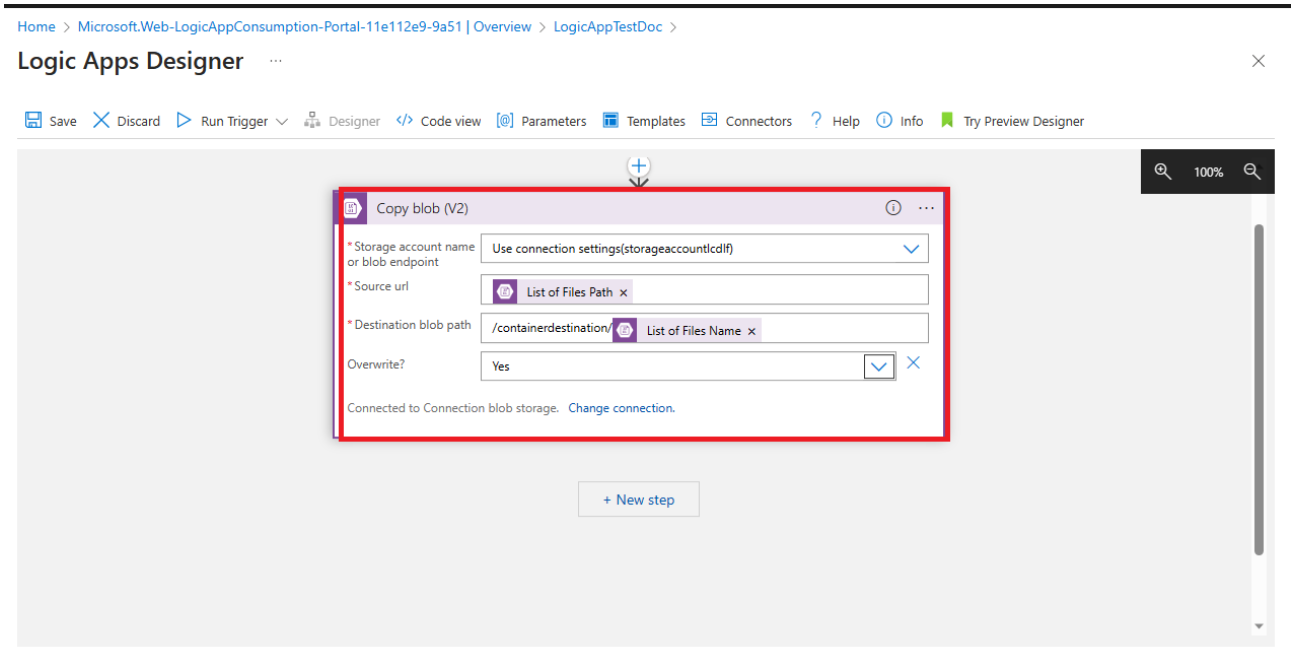
   a. **Storage Account Name or Blob Endpoint**: Select the Storage account created in chapter 5.1.1

   b. **Source Url**: Click “Add dynamic content” and select “List of Files Path”

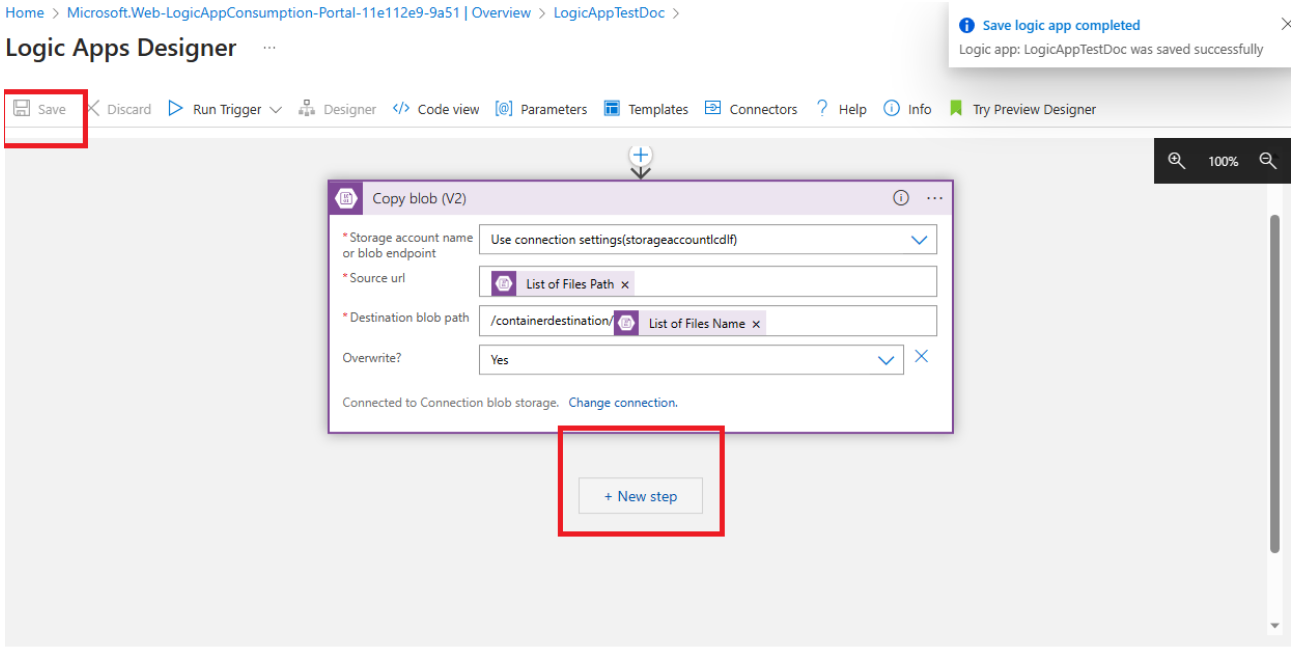
   c. **Destination Blob Path**: Enter a slash followed by the container's name where the processed files transferred to the on-premises machine is stored (i.e. the second container created in chapter 5.1.2), then add a slash and click "Insert dynamic content", search files name and select "List of Files Name".

   d. **Overwrite**?: Yes if files must be overwritten.
   NOTE: It must be set to “Yes” in order to reprint labels.



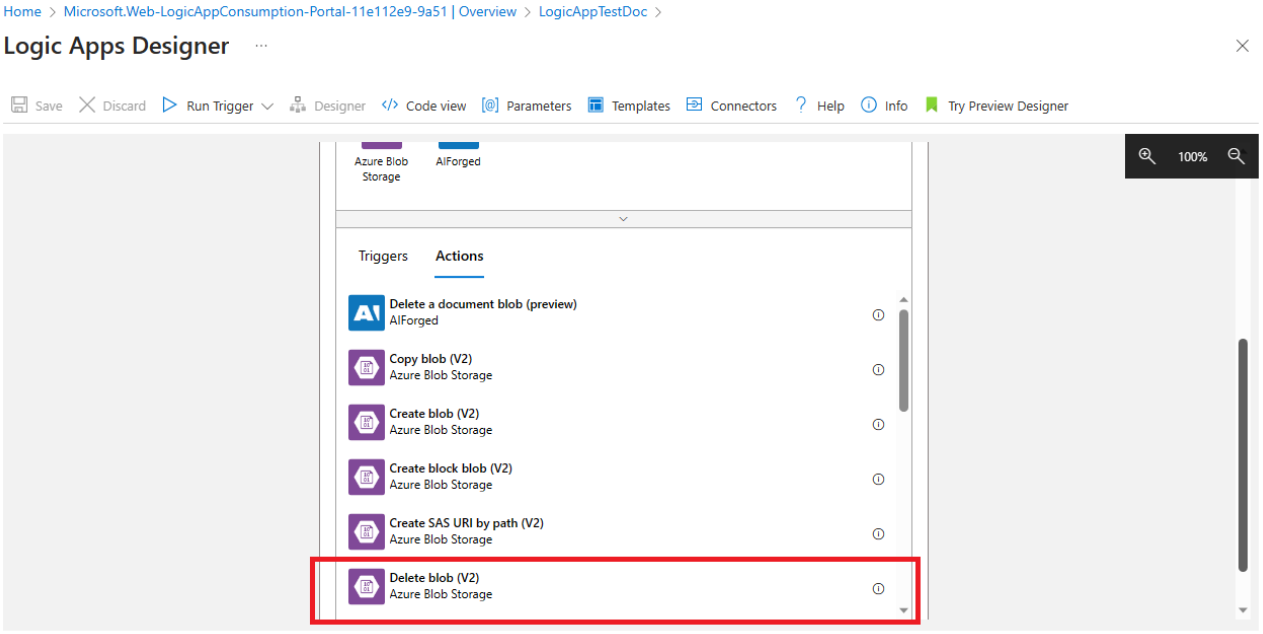


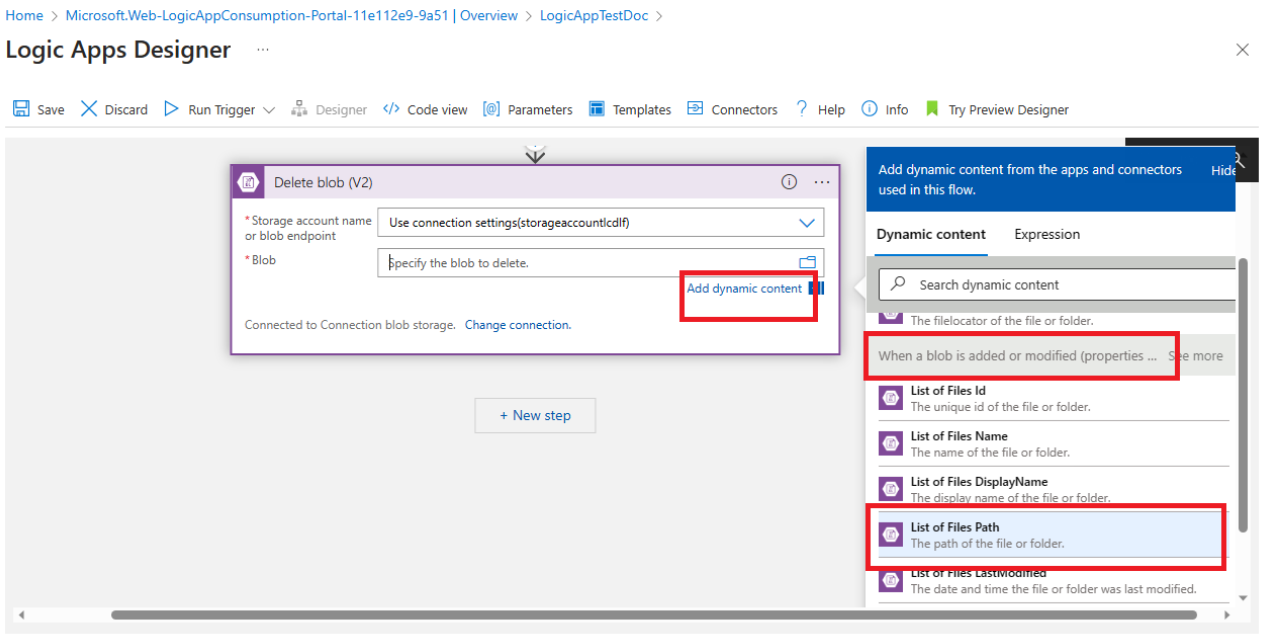
9. Click “Save” and “New step”

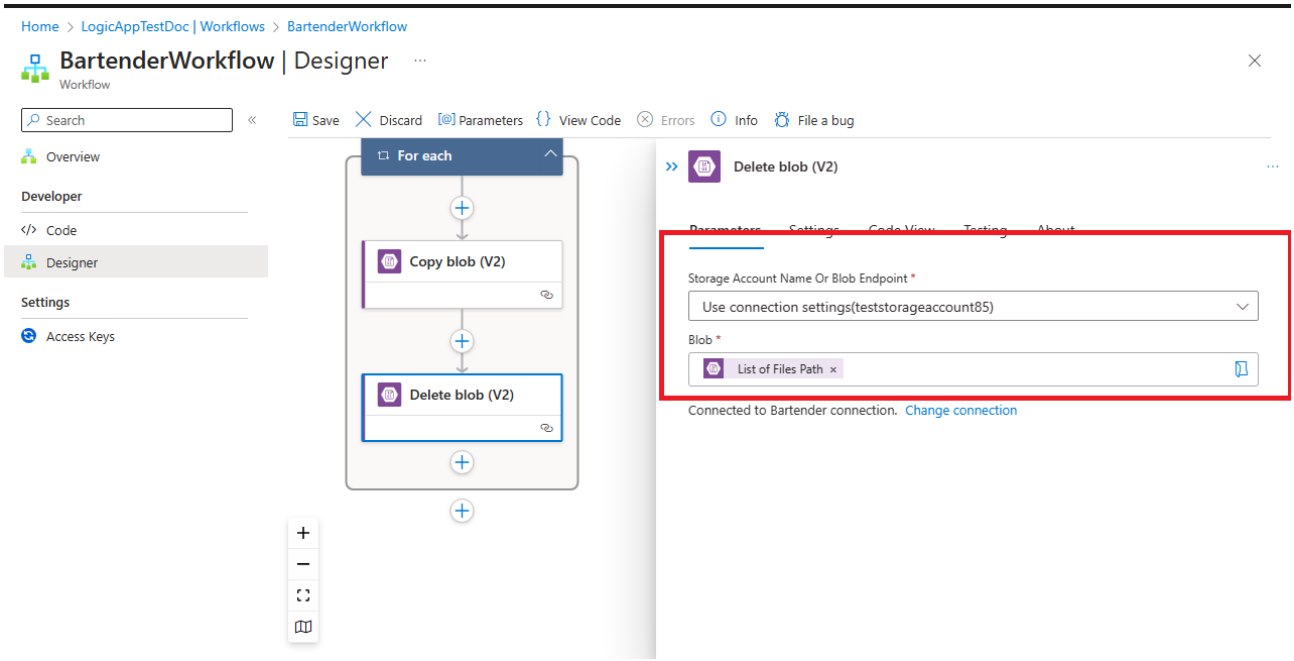


10. Search and select the Action Delete blob (V2).

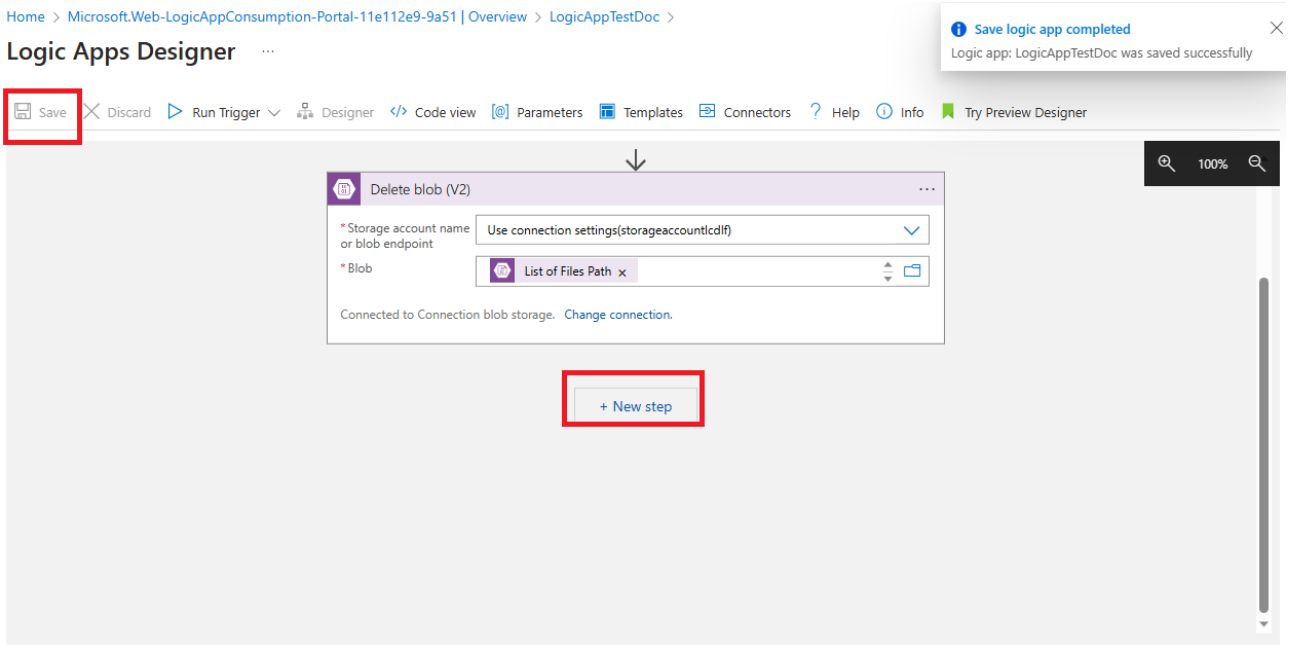
    In the Storage Account Name Or Blob Endpoint select the Storage account created in chapter 5.1.1
    In the Blob field, click “Add dynamic content” and select “List of Files Path”







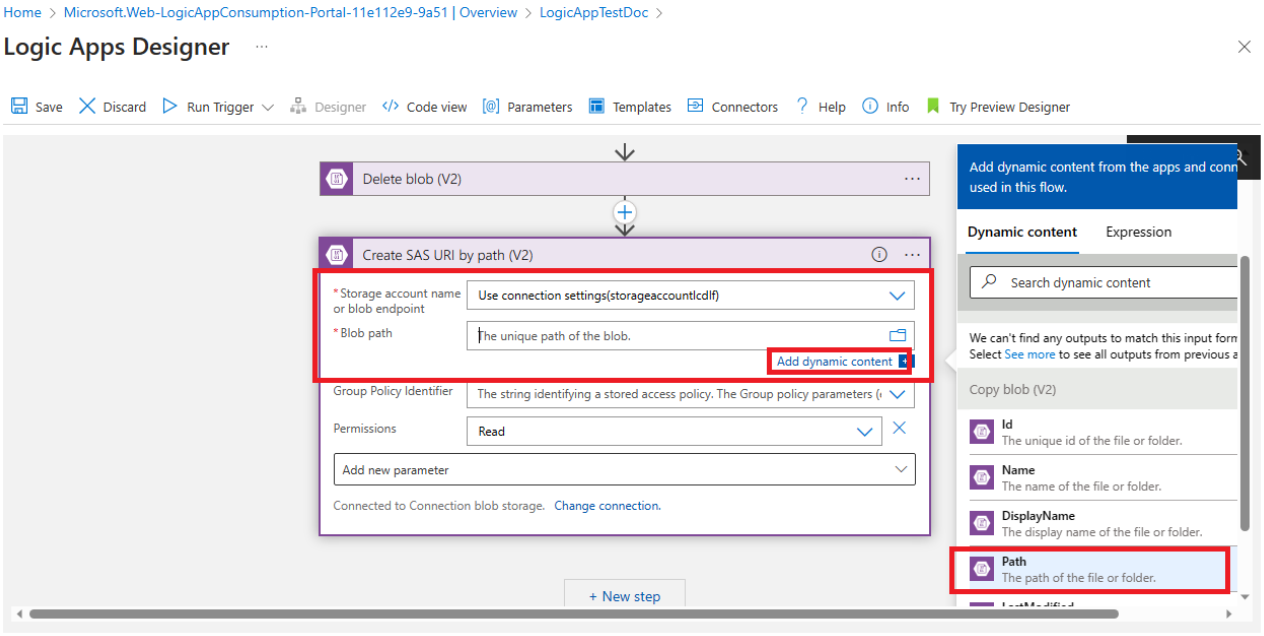
11. Click "Save" and "New step"



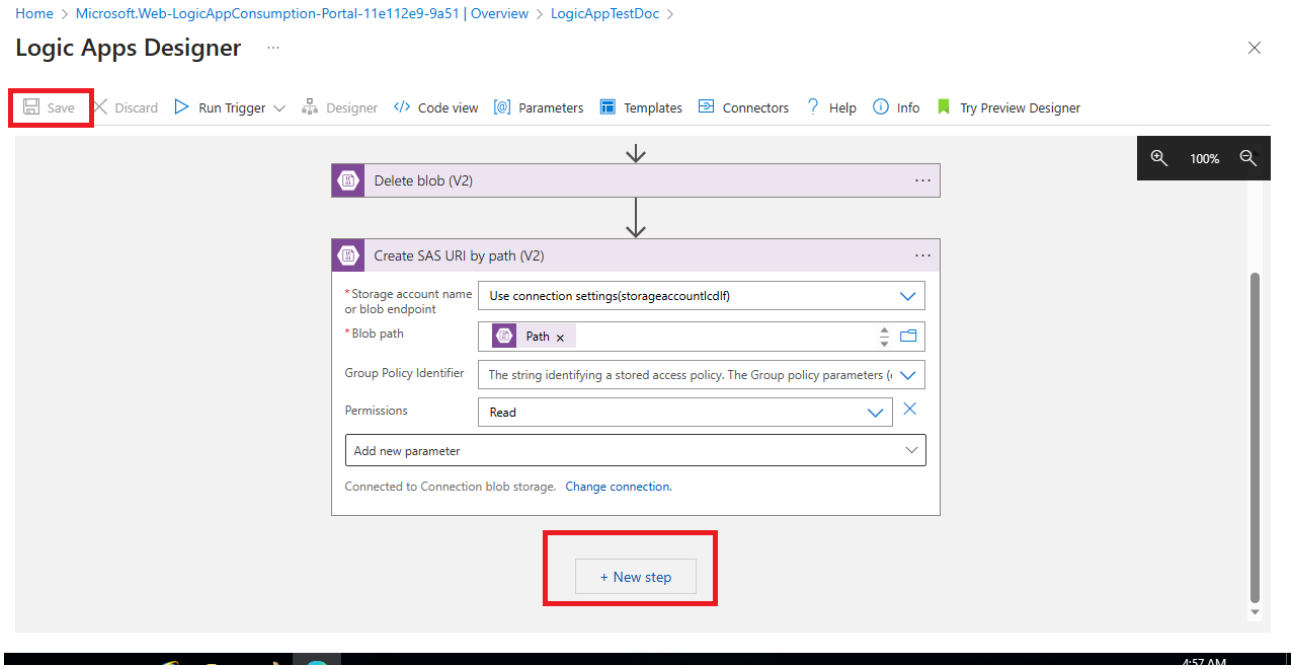
12. Search and select the Action "Create SAS URI by path (V2)".

    In the Storage account name or blob endpoint select the storage account created in chapter 5.1.1

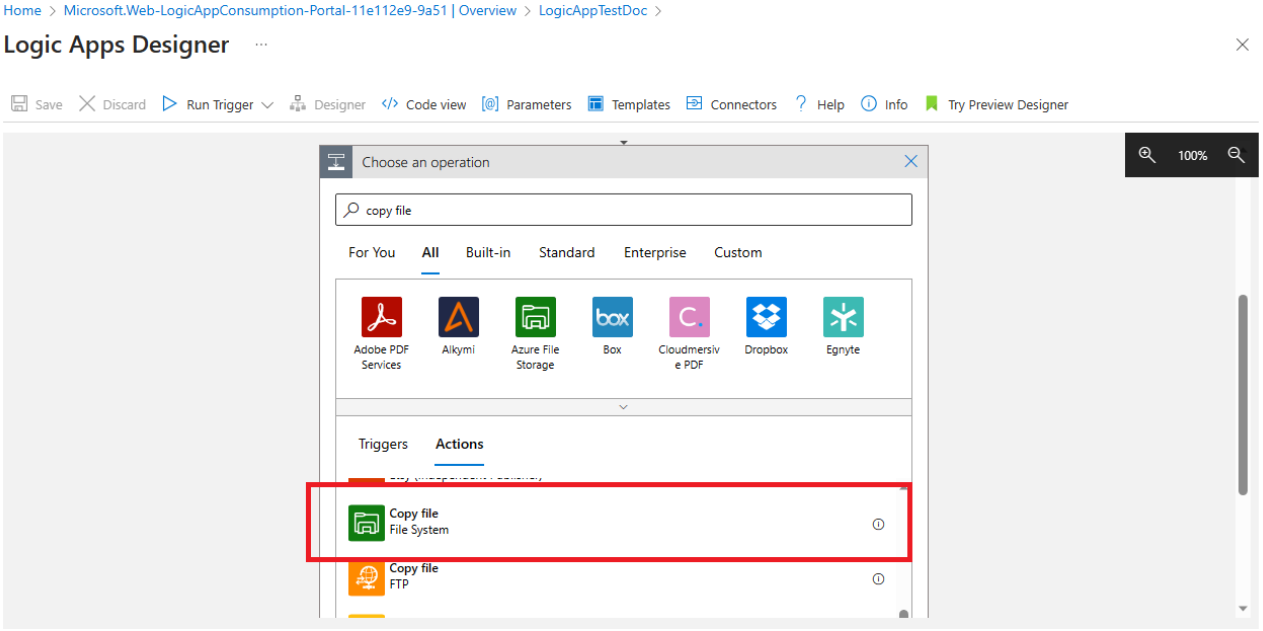
    In the Blob path field, click "Add dynamic content" and select Path under Copy blob (V2).



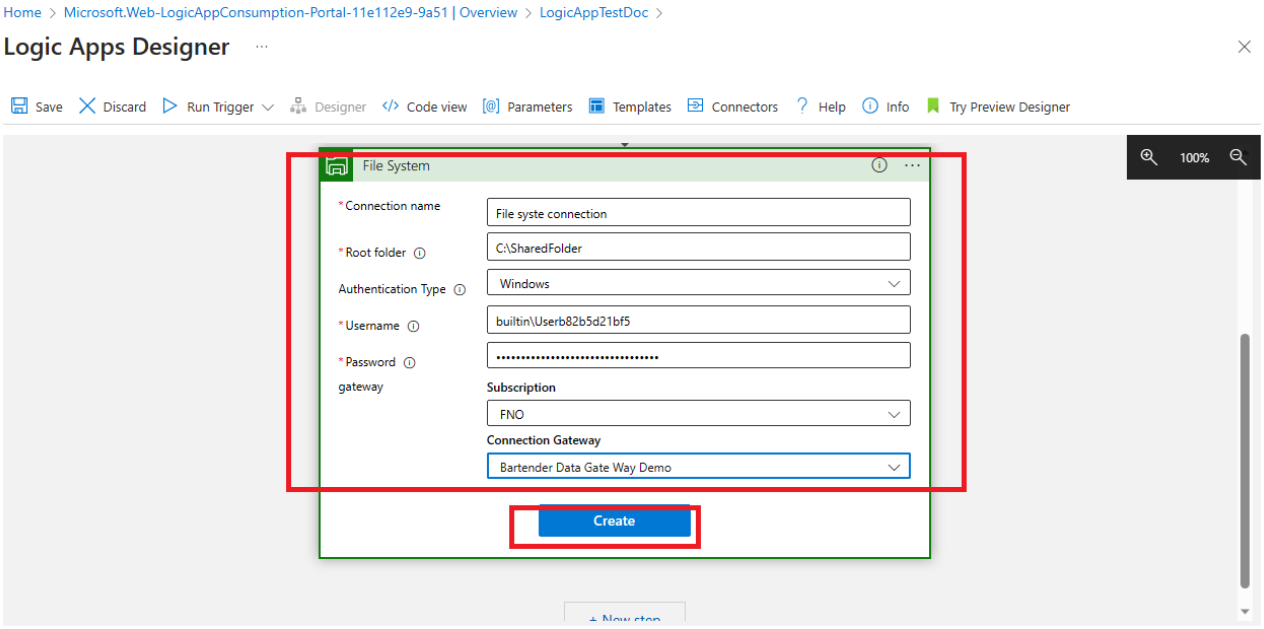
13. Click "Save" and “New step”.



14. Search and select the Action “Copy file” under the "File System" category.



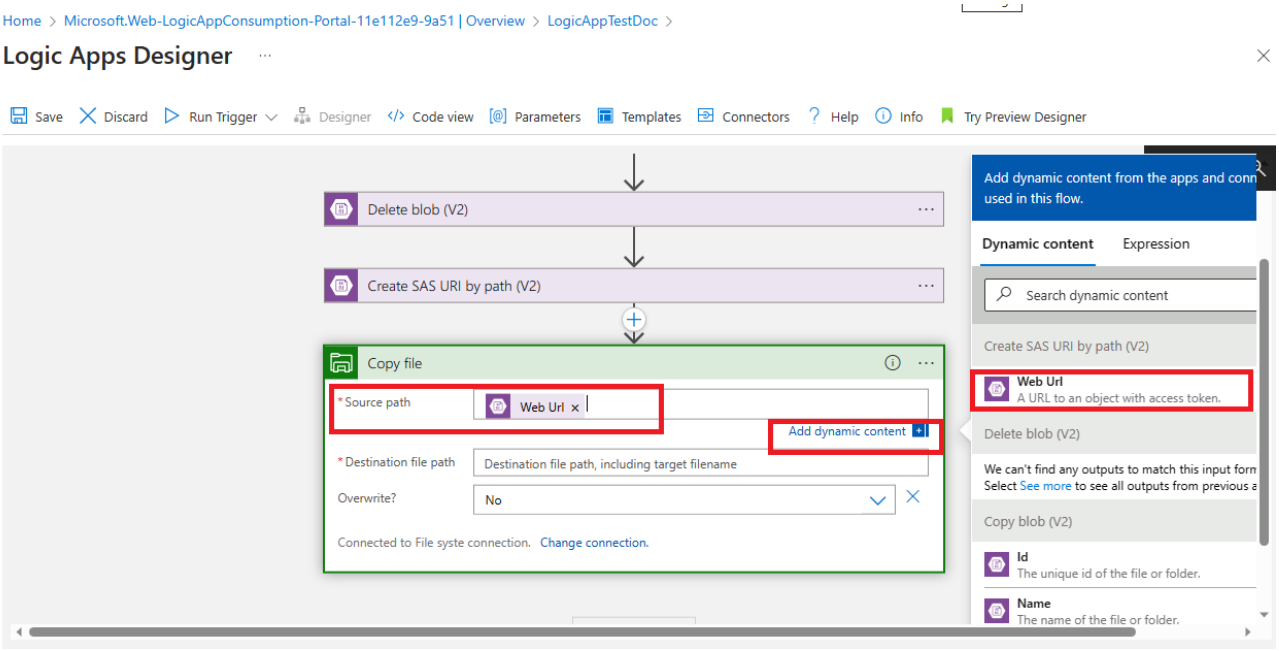
15. Under the File system, fill in the following fields:
    a. **Connection Name**;
    b. **Root folder**: define where the files should be transferred/folder on the on-premises machine;
    c. **Authentication Type**;
    d. **Username**: authentication information of the on-premises machine;
    e. **Password**: authentication information of the on-premises machine;
    f. **Subscription**;
    g. **Connection Gateway**: select the on-premises gateway created in chapter 5.3.2.
16. Click "Create New" as confirmation.

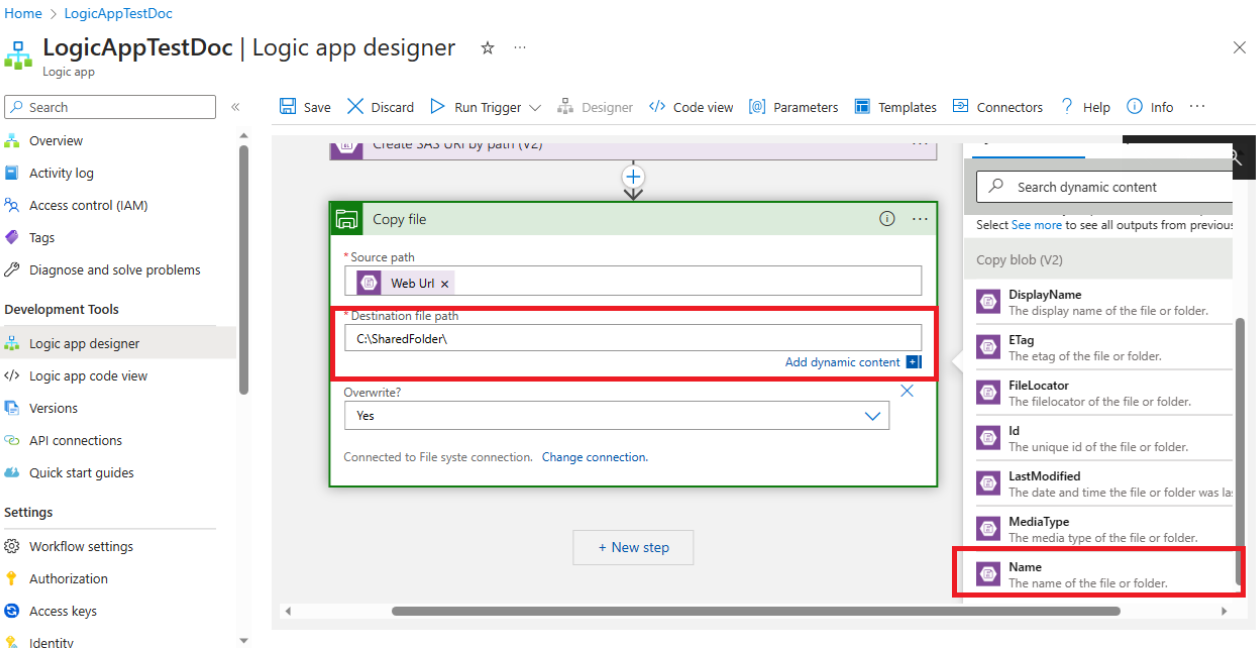


17. Under the Copy file, fill in the following fields:
    a. **Source path**: click the “Add dynamic content” and select **Web Url**;
    b. **Destination file path**: Add the “Root folder” selected on the previous step followed by slash plus the “Name” from the dynamic content.

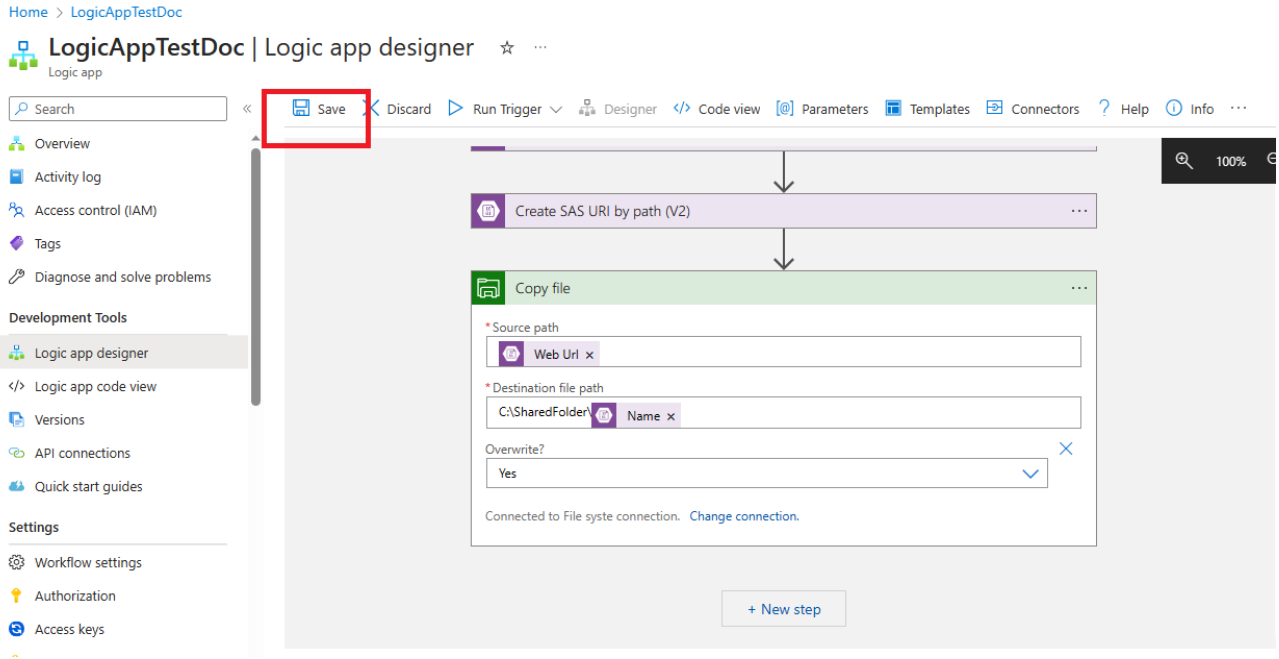
Note: if a subfolder is needed, it is possible to write "*subfolder*\" before adding the dynamic content "Name" (where *subfolder* must be substituted by the desired subfolder name);

c. **Overwrite**?: Yes if files must be overwritten.





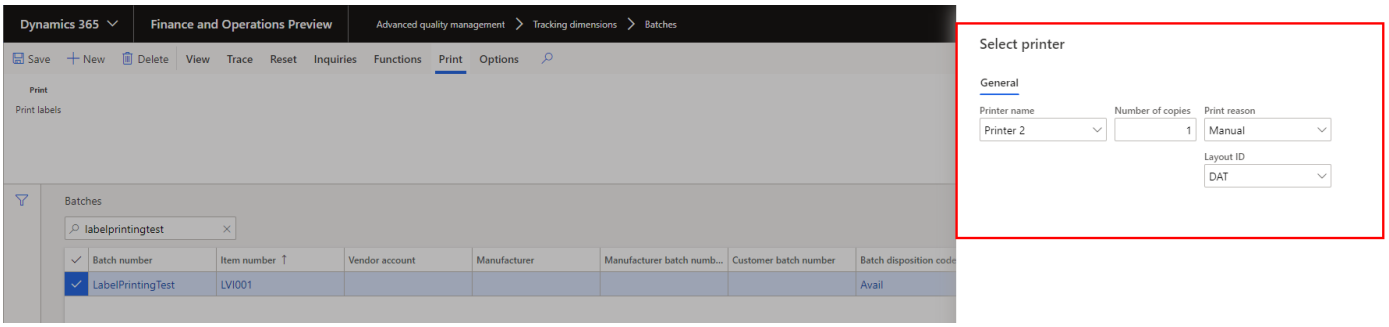
18. Click "Save".



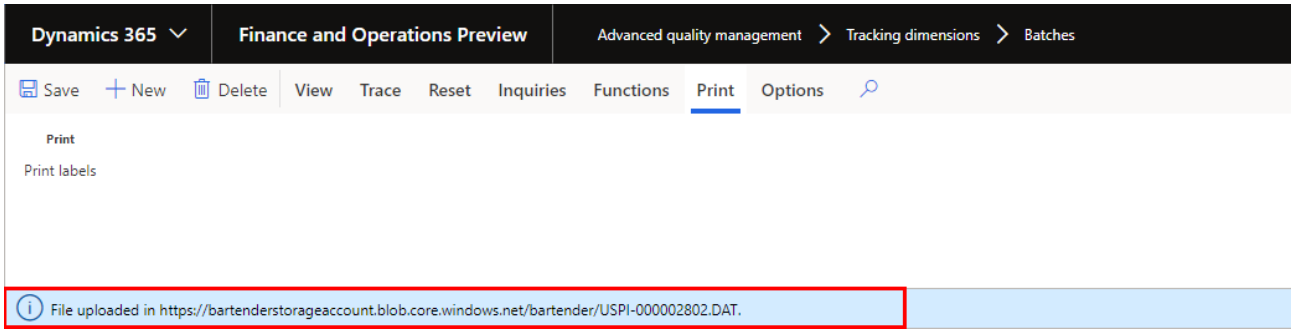
5.5 Example - Print documents from D365

Sign in D365 client.

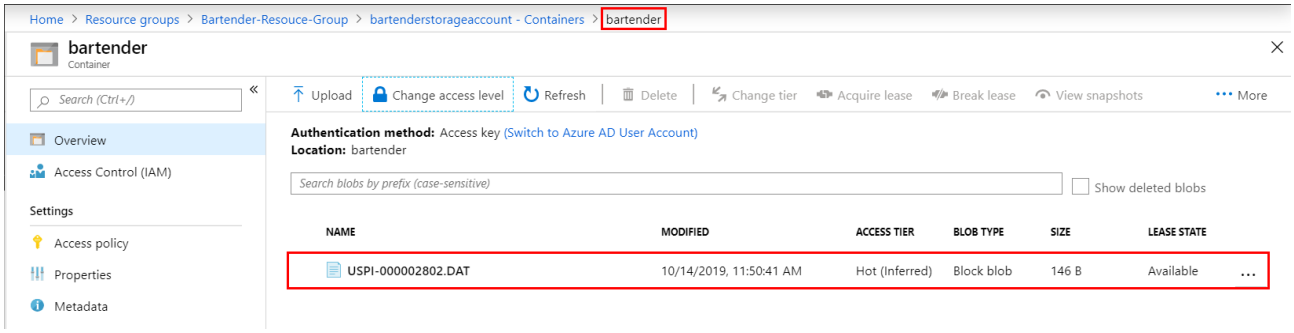
Choose any document that needs to be printed from D365:



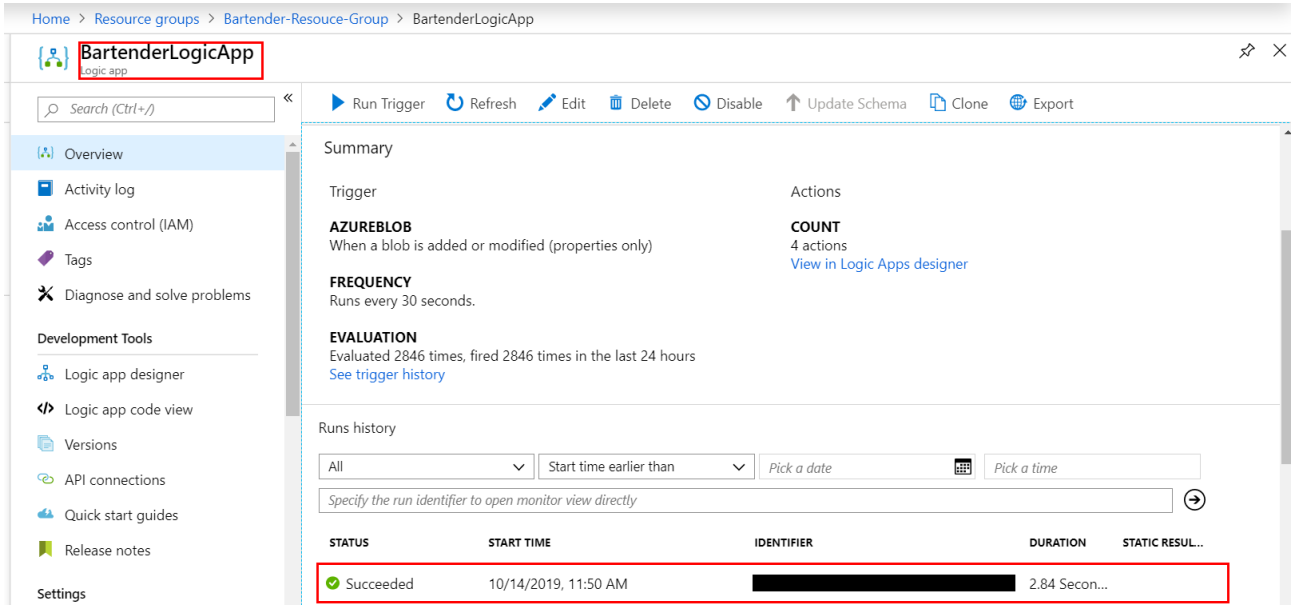
1. A confirmation message is displayed, showing the name of the document and the location where it was saved:



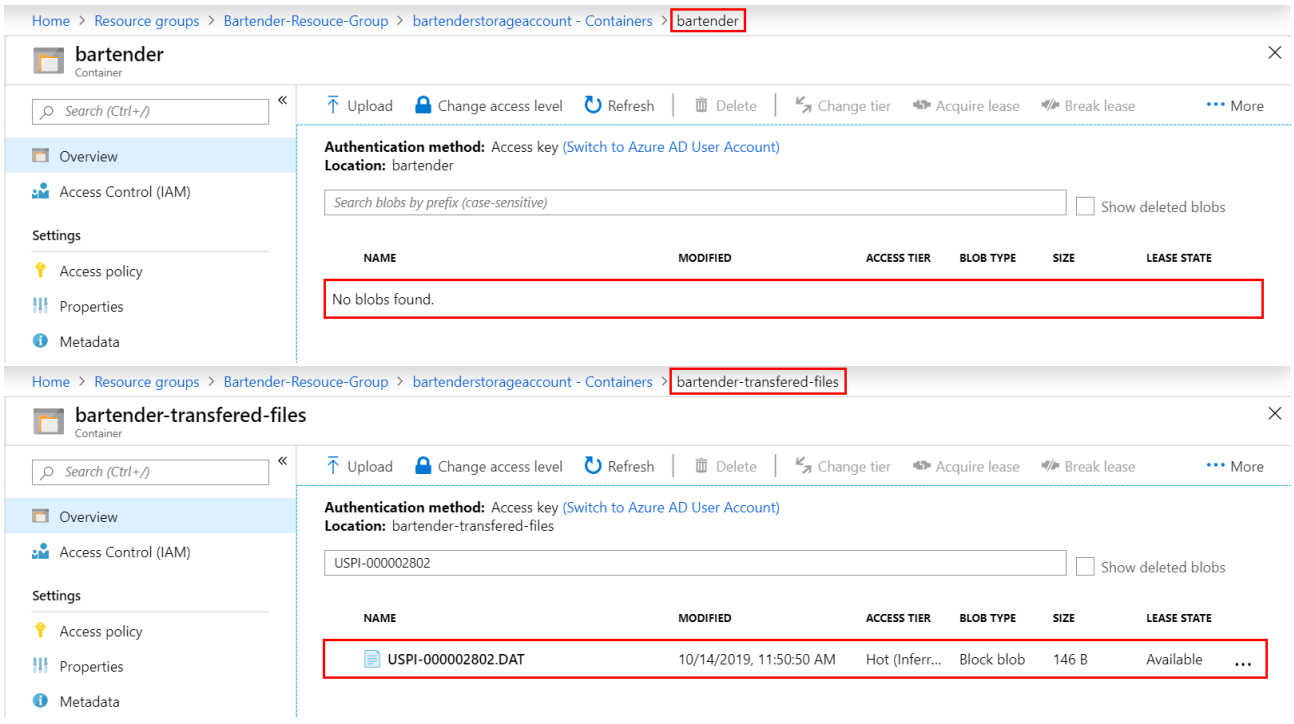
2. From Microsoft Azure (link: https://portal.azure.com/#home), go to the container of non-processed files (the first one created in chapter 5.1.2). Here it is possible to see the file correctly saved in the first container, waiting for the Logic App to be automatically activated.



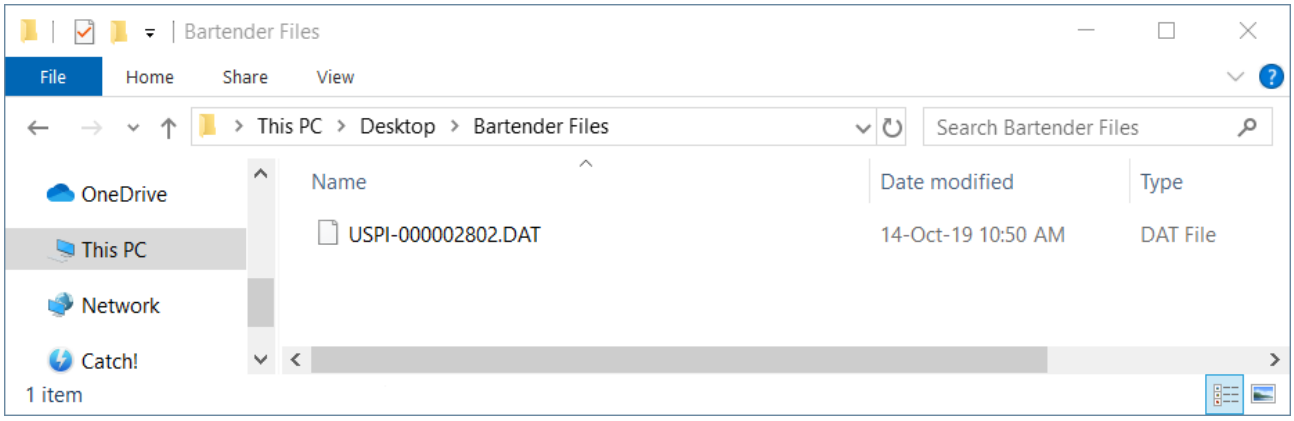
3. From the Logic App overview page, it is possible to verify its status.



4. As a further confirmation, it is possible to verify that the document is not present anymore in the first container but has now been moved to the second one, where the processed files are stored.



5. Finally, the file is now correctly transferred to the desired folder in the on-premises machine.



6. SETUP GUIDE FOR LABELING INTEGRATION TO CLOUD SOLUTION USING API CONNECTION

This setup guide applies when choosing to enable direct interaction between Dynamics 365 / Life Sciences Solution and third party label printing solution via HTTP APIs.

More details in general setup:

https://learn.microsoft.com/en-us/dynamics365/supply-chain/supply-chain-dev/label-printing-using-external-label-service

Setup required to prepare for NiceLabel Cloud integration:

https://learn.microsoft.com/en-us/dynamics365/supply-chain/supply-chain-dev/label-printing-using-nicelabel

Setup required to prepare for BarTender Cloud integration:

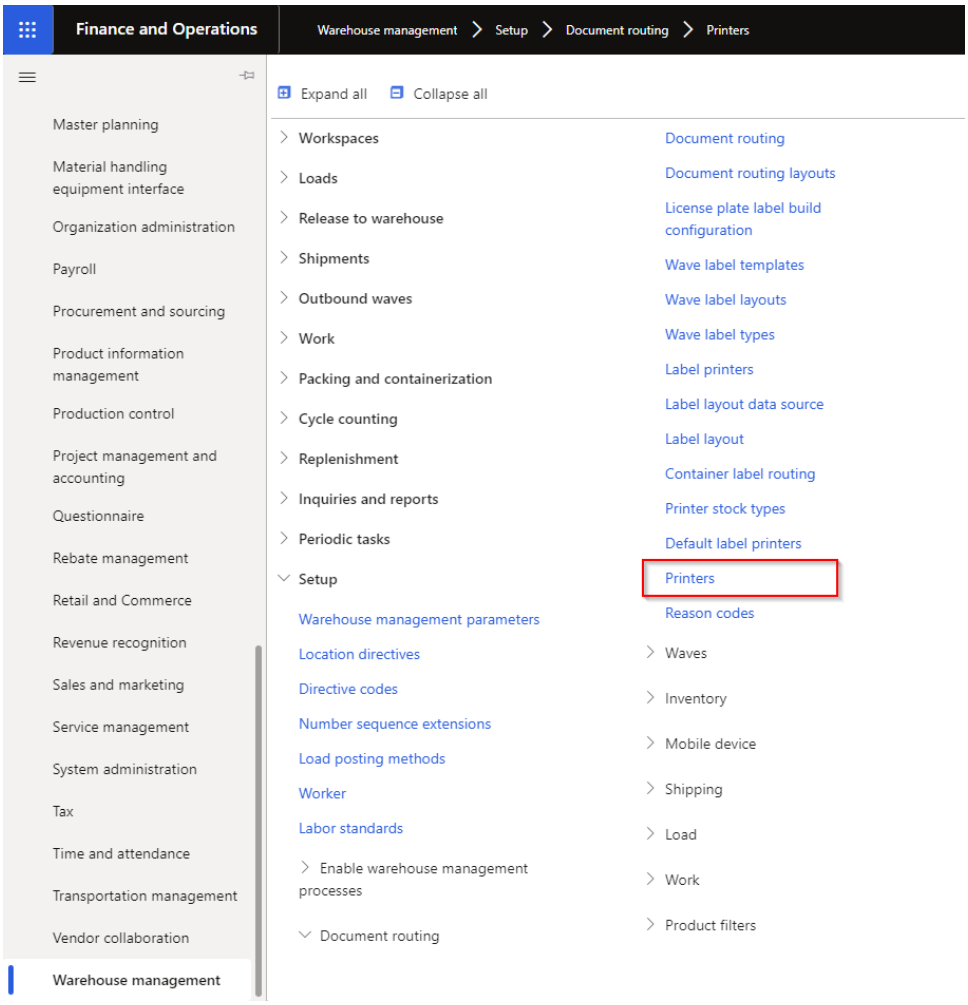
https://learn.microsoft.com/en-us/dynamics365/supply-chain/supply-chain-dev/label-printing-using-bartender

6.1 Setup in Dynamics 365

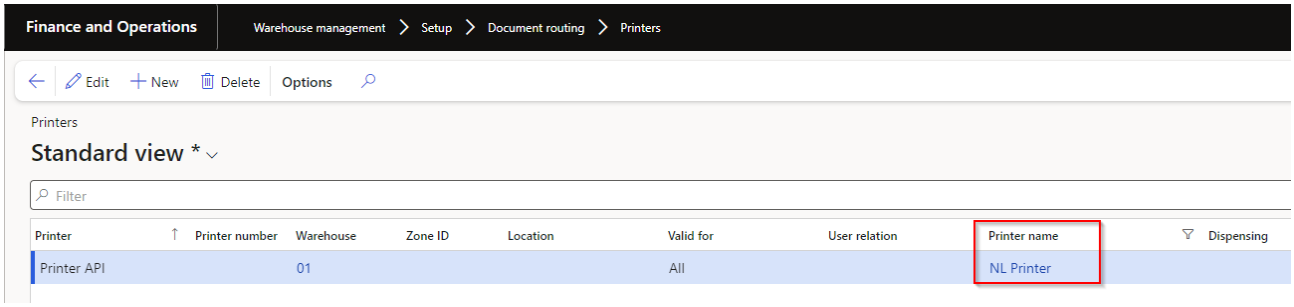
In additional to the general setup listed above, it is required to connect the SDN label printers with Microsoft label printers in order to use the API connection.

Sign in Dynamics 365 client.

1. Go to **Warehouse management > Setup > Document routing > Printers**.



2. In the **Printers** form, link the printers with cloud printers by defining the **Printer name** field.



NOTE: **Printer name** looks up to the **Label printers** form (**Warehouse management > Setup > Document routing > Printers**) where cloud printers are defined (i.e. **Connection type** "External label service"). The **Printers** form defines the list of printers that will be used as default in different processes (i.e. defined in the **Document routing** form) and displayed in the dropdown list upon manual label printing step.

7. DOCUMENT ROUTING AGENT

7.1 Overview

7.1.1 Printing overview in D365

In D365, you can print documents by using either a local printer or a network-connected device. In addition, you can export pages and reports directly from the client, as PDF files or Microsoft Office documents. Finally, the distributed workload lets you print business documents directly from a mobile device by using network resources.

Printing documents on network devices from hosted applications presents a unique set of challenges. Here are some examples:

1. Print drivers might not be available on the user's device.
2. The user's device might not be connected to the corporate network.

By using a dedicated host and following a few easy steps, system administrators can configure deployments so that users can print directly from business applications on network devices.

In addition to the platform that is deployed to the Azure subscription, Finance and Operations applications provide customers with an integrated, first-party Azure application that helps them more easily use domain-hosted devices to print documents.

7.1.2 Service overview

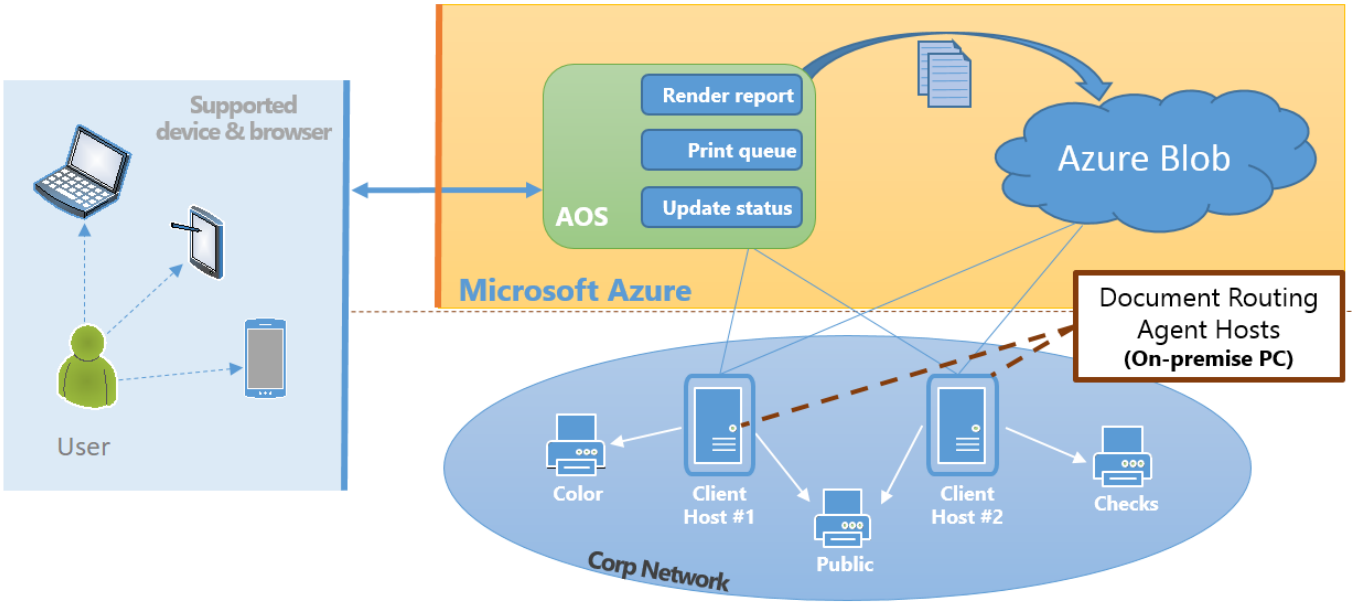
While documents that are produced by the hosted applications are waiting to be printed on a network-connected device, they are stored in Azure blob storage. The Install the Document Routing Agent to enable network printing uses Azure authentication to establish a secure channel to the Azure services.

Execution sequence:

1. The report is generated by Microsoft SQL Server Reporting Services (SSRS) and stored in Azure blob storage. Attached printer settings are stored together with the document.
2. The Document Routing Agent queries the Azure Service Bus queue for active jobs.
3. The document is downloaded by the Document Routing Agent and spooled to the network printer.

7.1.3 Service components for network printing

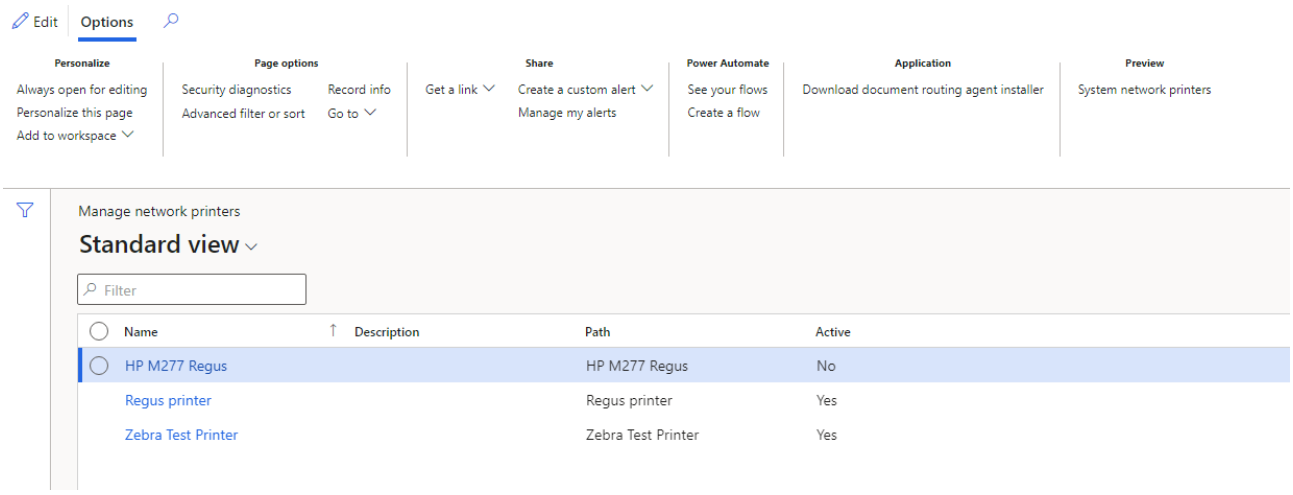
The following diagram shows the basic components that help support network printing operations.



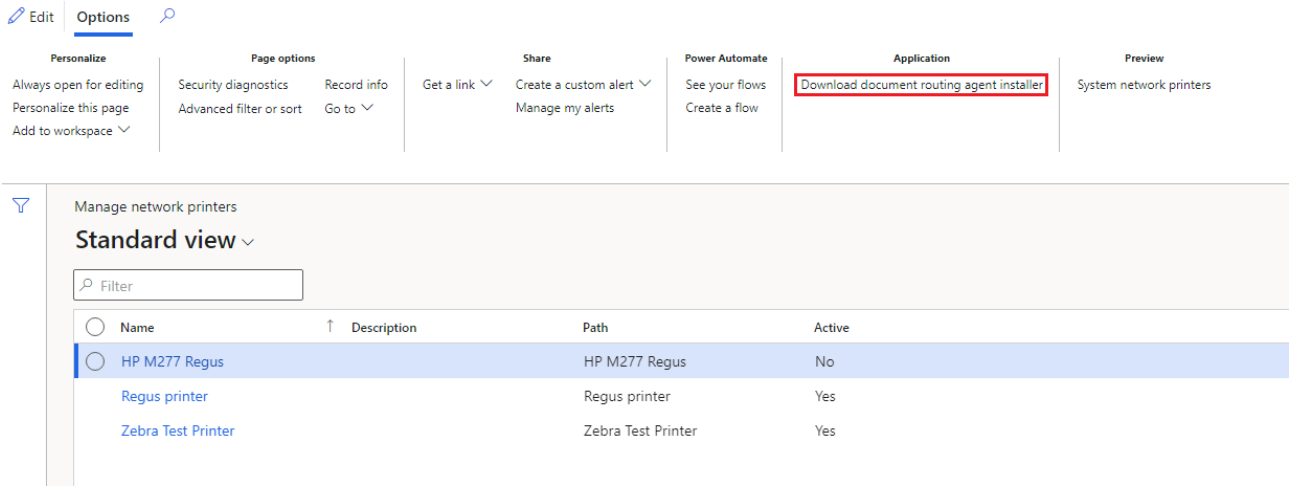
Network printers that are registered for applications can be used by all legal entities (also known as companies) that are defined in the environment. Network printer settings are company-specific. Therefore, administrators can restrict access, based on the user's active company. For example, users in the active company might have access to all the network printers that are registered by the Document Routing Agent. However, users in another company won't have access to those printers until access is explicitly enabled for that company.

7.2 Installation of the Document Routing Agent

1. In D365, open the **Manage network printers** page (click: **Organization administration > Setup > Network printers > Manage network printers**).



2. On the **Options** tab, in the **Application** group, click **Download document routing agent installer**.



3. Run the downloaded file to begin the installation process.
4. Complete the setup process.

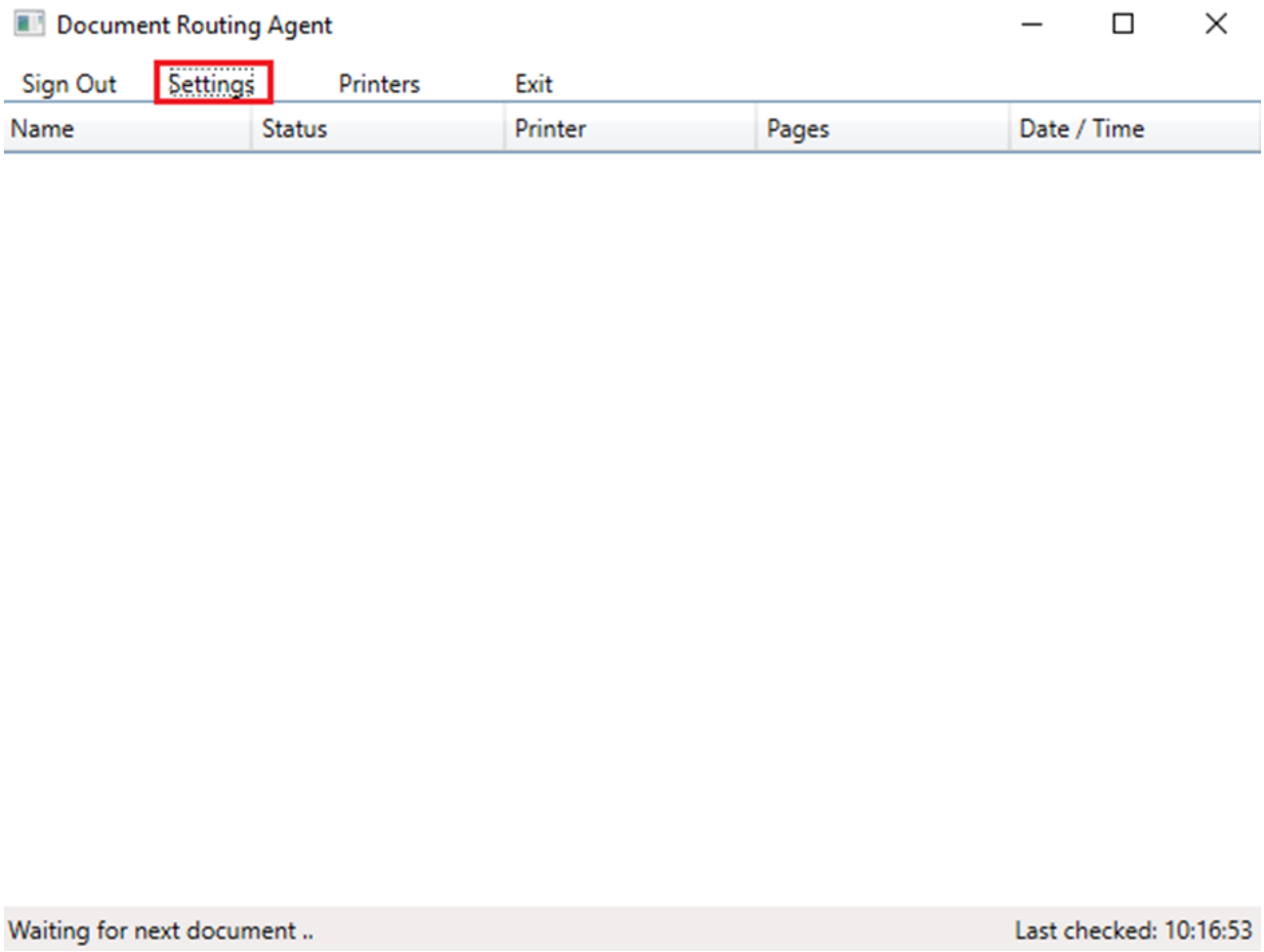
NOTES: Only one Document Routing Agent can be installed in one server. One Document Routing Agent can point to only one instance of D365.

One printer can be referred to from many Document Routing Agents. One instance of D365 can refer to many Document Routing Agents.

SDN suggests defining at least two Document Routing Agents for the production system, for load balancing and high availability reasons.

7.3 Document Routing Agent configuration

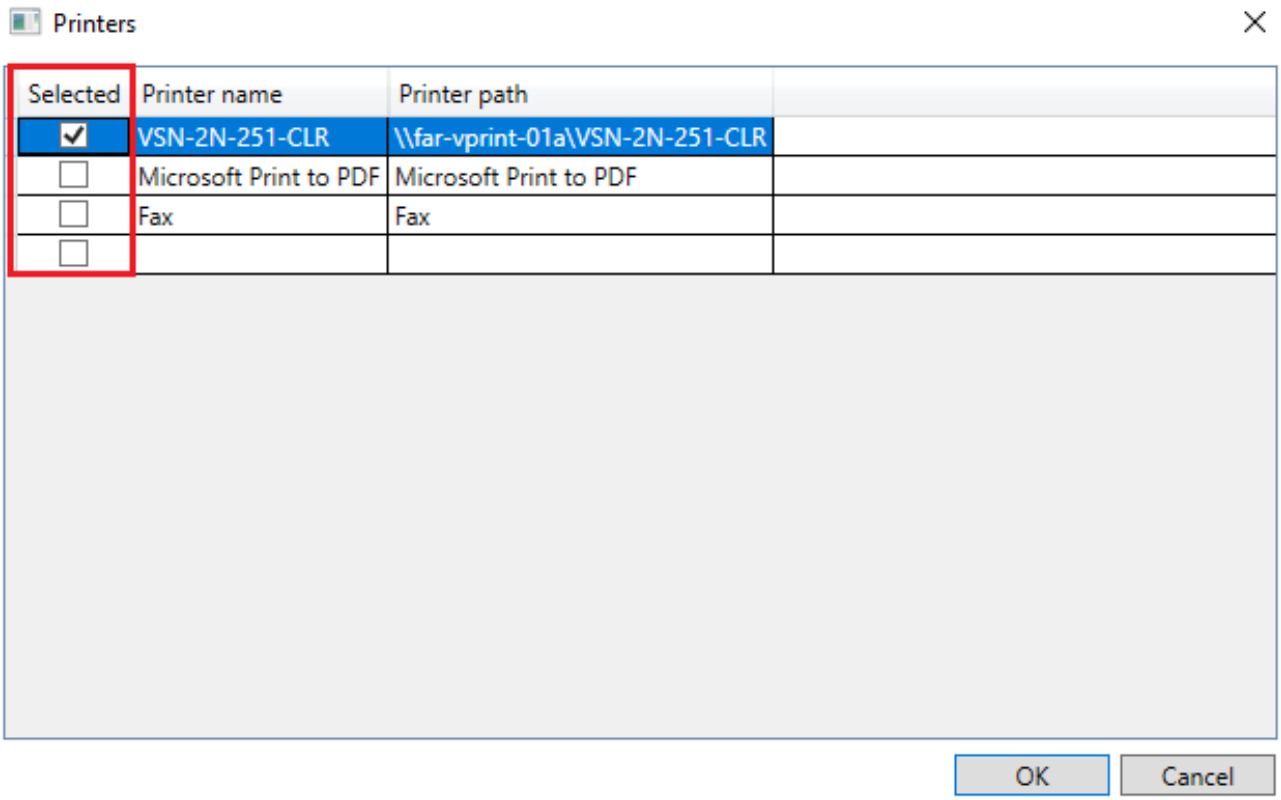
1. Close all browser instances that are running the application. This resets the local Azure authentication tokens.
2. On your desktop, run the Document Routing Agent.
3. On the toolbar, click **Settings**.



4. Add the following settings:
    a. **Application ID:** The ID that is unique to the application and should be entered automatically.
    b. **Finance and Operations URL:** The base URL of the application.
    c. **Azure AD tenant:** The domain name of the Azure AD.
5. Click **OK**.
6. Click **Sign In** to sign to your account. The account must share the same domain as the Azure AD associated with the application. The Document Routing Agent is ready to process documents and the Printers button are available on the toolbar.

7.4 Register network printers

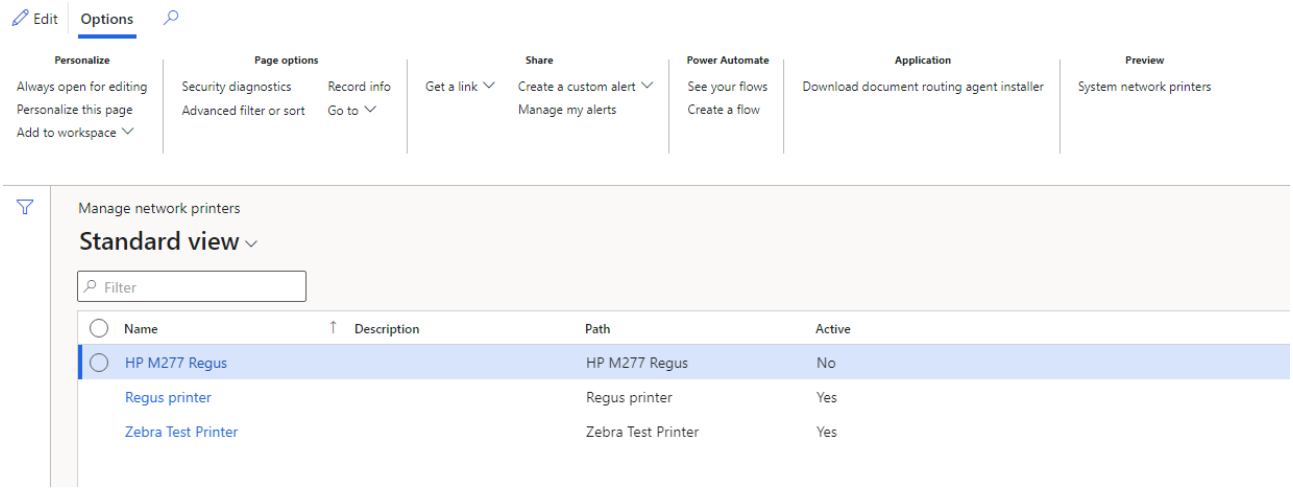
1. On the toolbar, click **Printers.**
2. Select the printers to make available in the applications.



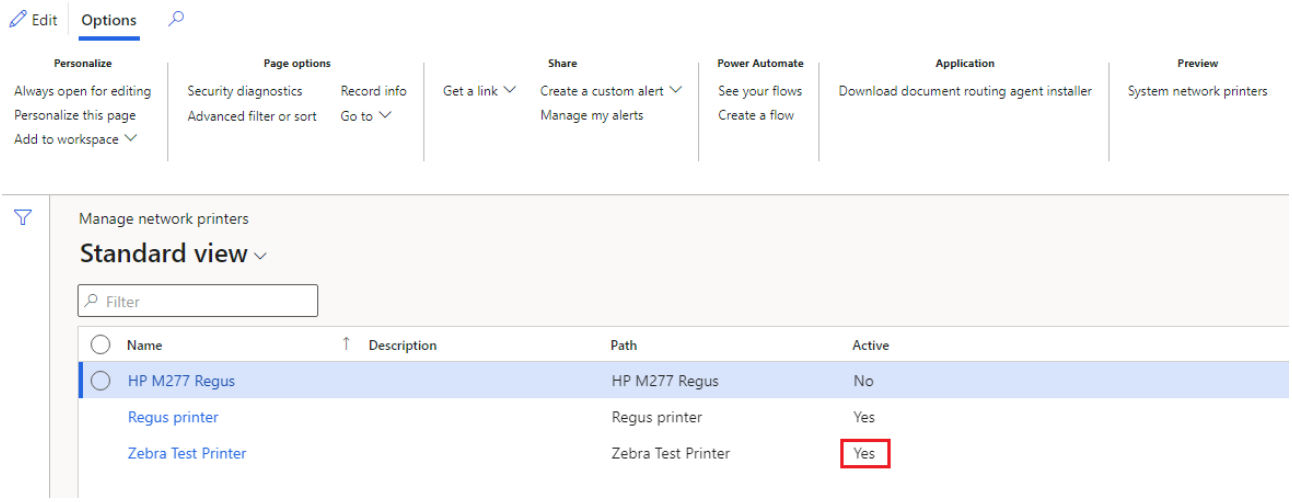
3. Specify a default name for the printer.
4. Click **OK**.

7.5 Administer network printers

1. Open the **Manage network printers** page (click: **Organization administration > Setup > Network printers > Manage network printers**).



2. Edit the existing entries that are mapped to each network printer. As part of your changes, edit the connection path.
3. To include a printer as an option in the Print Destinations field, set the **Active** field to "Yes".



Most of the information of this chapter is extracted from the following webpages (as of 18th May, 2022):

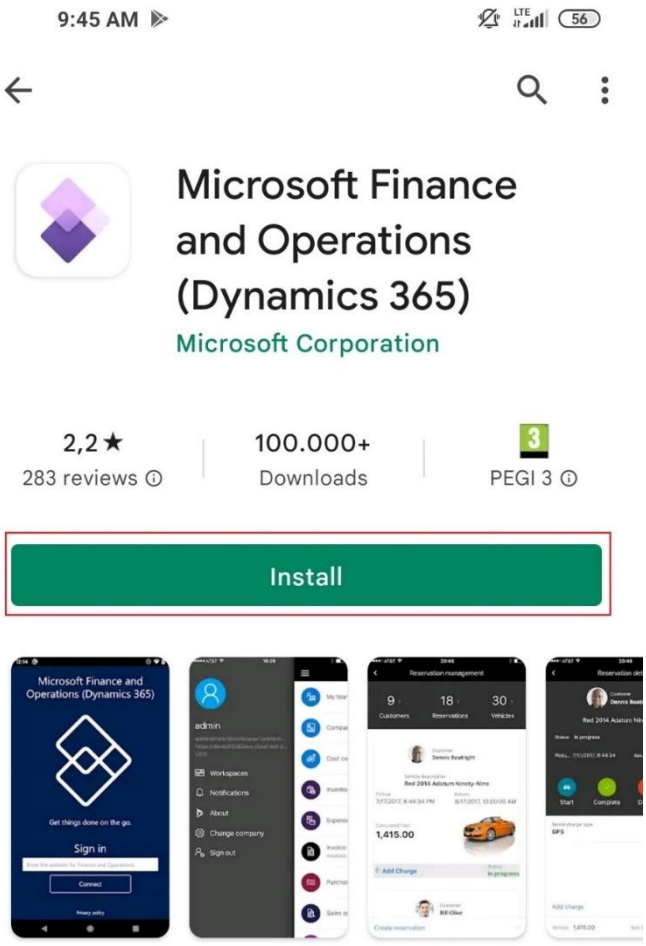
https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/print-documents?toc=%2Fdynamics365%2Fcommerce%2Ftoc.json

https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/analytics/install-document-routing-agent

8. Microsoft Finance and Operations (Dynamics 365) app installation

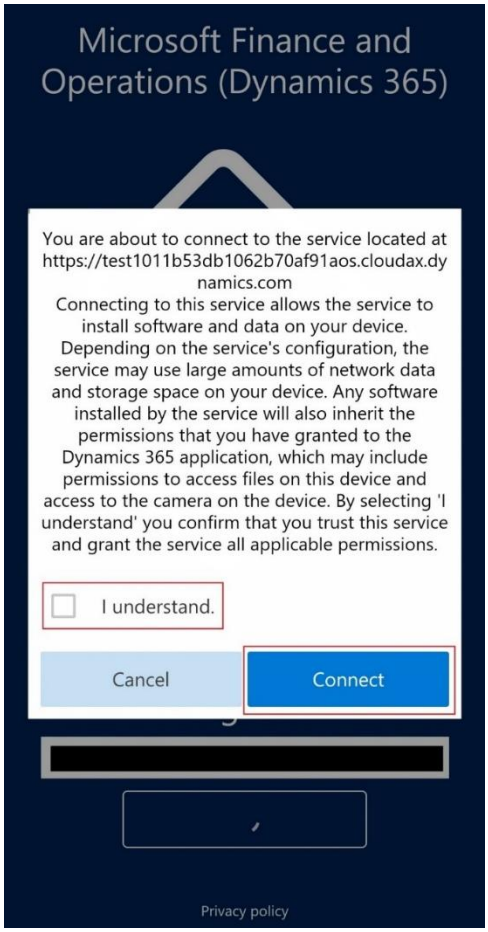
Note: It is possible to install the Microsoft Finance and Operations (Dynamics 365) app only on mobile devices. Currently, a desktop version is not available.

1. Go to the **Play store**, search for "Microsoft Finance and Operations (Dynamics 365)", select the app and click **Install**.

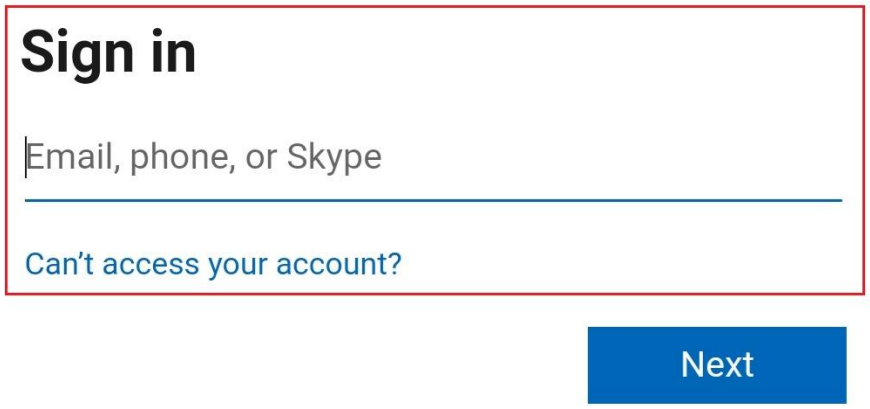


2. Open the app. In the Sign in field, enter the link to the D365 environment and click Connect.

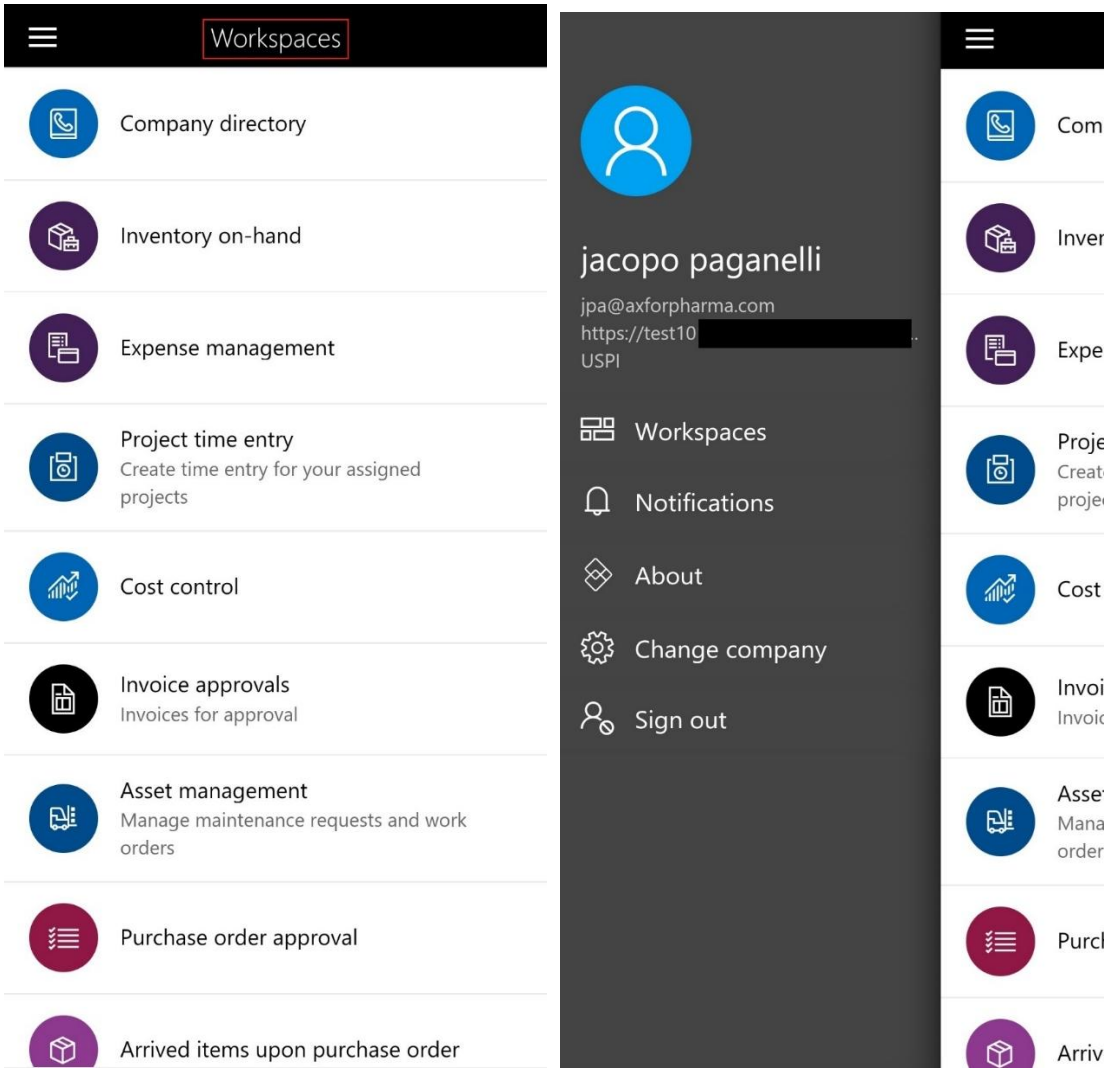
3. Tick the "I understand" checkbox and click Connect.



4. Sign in, using the email and password related to your user.



5. The user is connected to the app and all the available workspaces are displayed.



9. ATTACHMENT A

This chapter contains a list of links related to material, documentations, FAQs, etc. that Microsoft sent by email during the initial steps of the configuration of a project. These links are updated as of May 2022.

Please find below some helpful links:

1. Implementation lifecycle management
2. Microsoft FastTrack for Dynamics 365 overview
3. Development and administration for Dynamics 365 for Finance and Operations
4. One Version service updates FAQ
5. Go Live FAQ
6. Tech talk videos
7. What's new or changed for all new features
8. Connect with FastTrack team and other community members offline
9. Dynamics 365 for Finance and Operations - Help and Support plans
10. YouTube Dynamics 365
11. Licensing Guide
12. Cloud Services Operations Guide
13. For information on privacy, compliance, and security procedures
14. Terms and Conditions of Microsoft Services
15. Refer to Online Services Terms (OST) section and download the document after selecting the language
16. Lifecycle Policy
17. Support Options

10. ATTACHMENT B

Below, some elements of the e-mail sent by Microsoft during the initial phase of the project configuration (May 2022).

10.1 Support:

In LCS, use Issue search to find Microsoft Knowledge Base (KB) articles, hotfixes, and workarounds for reported issues in Finance and Operations. You can track fixes that are important for you as they are being worked on to ensure you are informed when they are ready.

Issue search (Lifecycle Services, LCS)

Additionally, all Dynamics 365 Customers have a minimum of ***Subscription Support*** plan which is included with their cloud subscription. However, if you've purchased any additional support plan, you're entitled to additional benefits. Please refer to the following links:

Microsoft Dynamics 365 Support

Find support for Microsoft Dynamics 365 for Finance and Operations, Enterprise edition and Dynamics Lifecycle Services

10.2 Servicing Requests:

You can submit requests directly to the Dynamics Service Engineering (DSE) team in Lifecycle Services (LCS). See the following link to understand when to use Service requests in LCS

Submit a request to the Dynamics Service Engineering team

10.3 Community:

During your implementation, if you have any questions on implementation best practices, search or post your questions in the FastTrack team managed Community Forum.

10.4 As you get closer to Go-Live:

You may receive an email from the Microsoft FastTrack team to review the Go-live readiness of your project. This is a mandatory step before requesting the production environment. Please go through Preparing for Go-live for more details.

If you're close to your Go-live date and you've already/almost completed your UAT, please follow the steps below:

Download the Pre Go-live Checklist

Fill it in

Send it to go-live@microsoft.com

The FastTrack team will review your project and get back to you with an assessment of your readiness.